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

User Manual
Inventory (Internal Indent)

Version	**: 6th Edition**
Document ID	**: U.MANUAL_INV_INTERNAL INDENT**

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
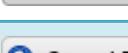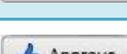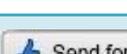
- Indent Approval

1.3   Organised Sections

These are the sections within this document:

- Section 1 : Introduction

- Section 2 : Application Standard Features

- Section 3 : Internal 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 (Intra Facility)	8

3.0   Internal Indent

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 Recommended Indent List (RIL) or at ad-hoc situation via supplementary where there is a sudden need to require the items.

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).
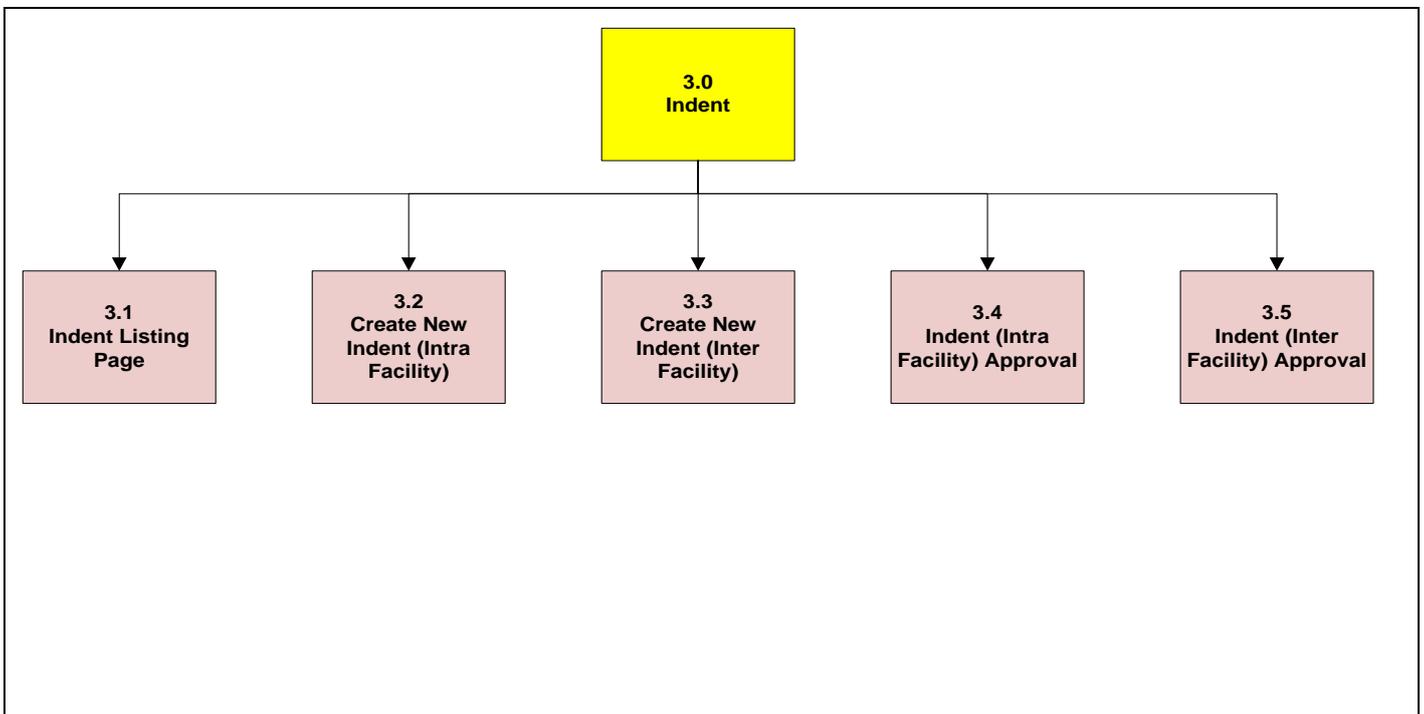
Functional Diagram

```
                              ┌──────────────┐
                              │     3.0      │
                              │    Indent    │
                              └──────┬───────┘
        ┌──────────────┬─────────────┼──────────────┬──────────────┐
        ▼              ▼             ▼              ▼              ▼
┌──────────────┐┌──────────────┐┌──────────────┐┌──────────────┐┌──────────────┐
│     3.1      ││     3.2      ││     3.3      ││     3.4      ││     3.5      │
│ Indent       ││ Create New   ││ Create New   ││ Indent (Intra││ Indent (Inter│
│ Listing      ││ Indent (Intra││ Indent (Inter││ Facility)    ││ Facility)    │
│ Page         ││ Facility)    ││ Facility)    ││ Approval     ││ Approval     │
└──────────────┘└──────────────┘└──────────────┘└──────────────┘└──────────────┘
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Figure 3-0-1

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

3.1 Internal Indent

Requesting Unit will indent Drug/Non Drug items from the Supplying unit. 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.

3.1.1 View Existing Transaction

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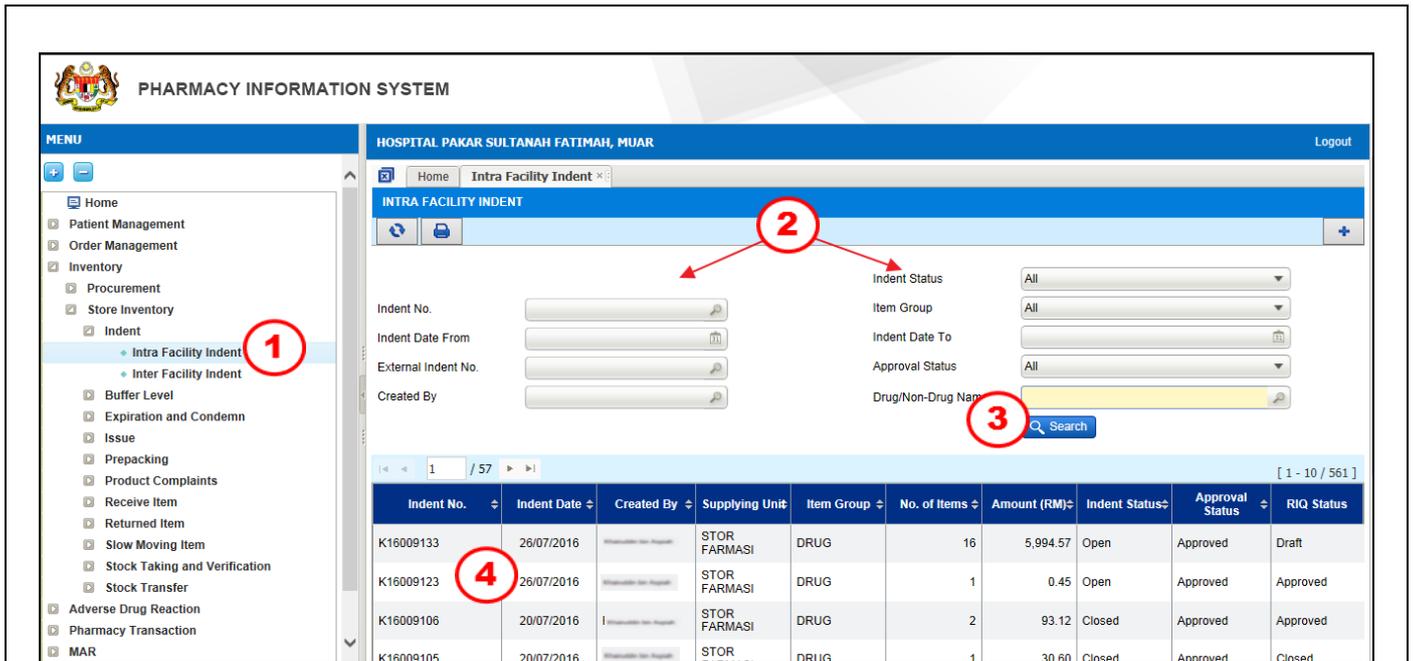

Figure 3.1.1-1 Indent listing Page

STEP 1

Click on 'Inventory' menu followed by 'Store Inventory' and then click 'Indent'

STEP 2

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

No	Field	Description	Remarks
a	Type	Search by : - Intra - Inter	Able to filter and search record(s)
b	Indent No	Indent Number	Display all existing Indent No. belongs to the ward/unit
c	Indent Status	Search by : - All - Cancel - Close - Open	Able to filter and search record(s)
d	Item Group	Search by : - All - Drug - Non Drug	Able to filter and search record(s)
e	Indent Date From	Start date for the indent transaction	Format field (dd/mm/yy)

f	Indent Date To	Start date for the indent transaction	Format field (dd/mm/yy)
g	Approval Status	Search by: - All - Approved - Open - Pending For Approval - Rejected	Able to filter and search record(s)
h	Created By	Name of the person who created the transaction	

Table 3.1.1-1

STEP 3
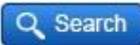
Click on the 🔍 Search button after input of criteria

STEP 4

Double-click on the selected record details listed as per Figure 3.1.1-1

Note

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

- *The screen will display the indent details.*

3.2 New Indent (Intra Facility)

To create a new record for Indent, perform steps below:
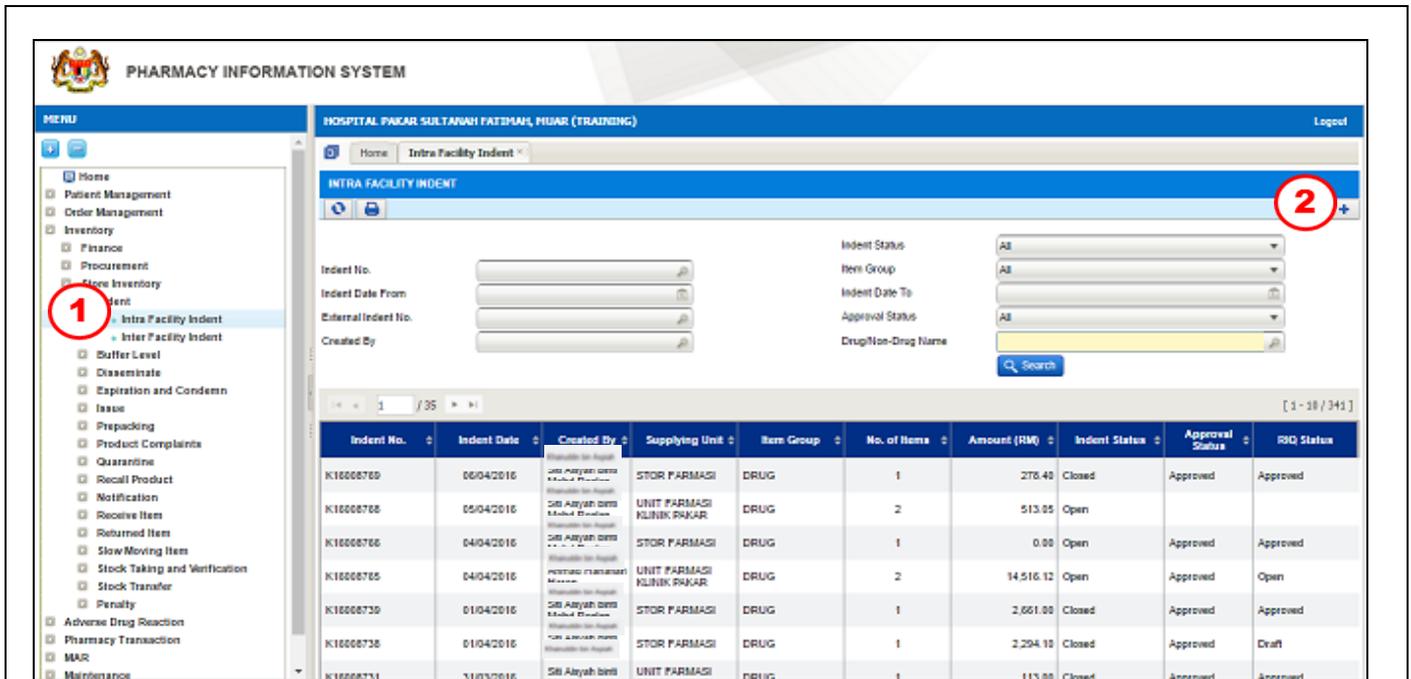
Figure 3.2-1 Indent Listing Page

STEP 1

Click on 'Inventory' menu followed by 'Store Inventory' and then click 'Indent'

STEP 2

Click on the ➕ button to create a new record

Note

- *Indent screen will be displayed as shown in Figure 3.2-2.*
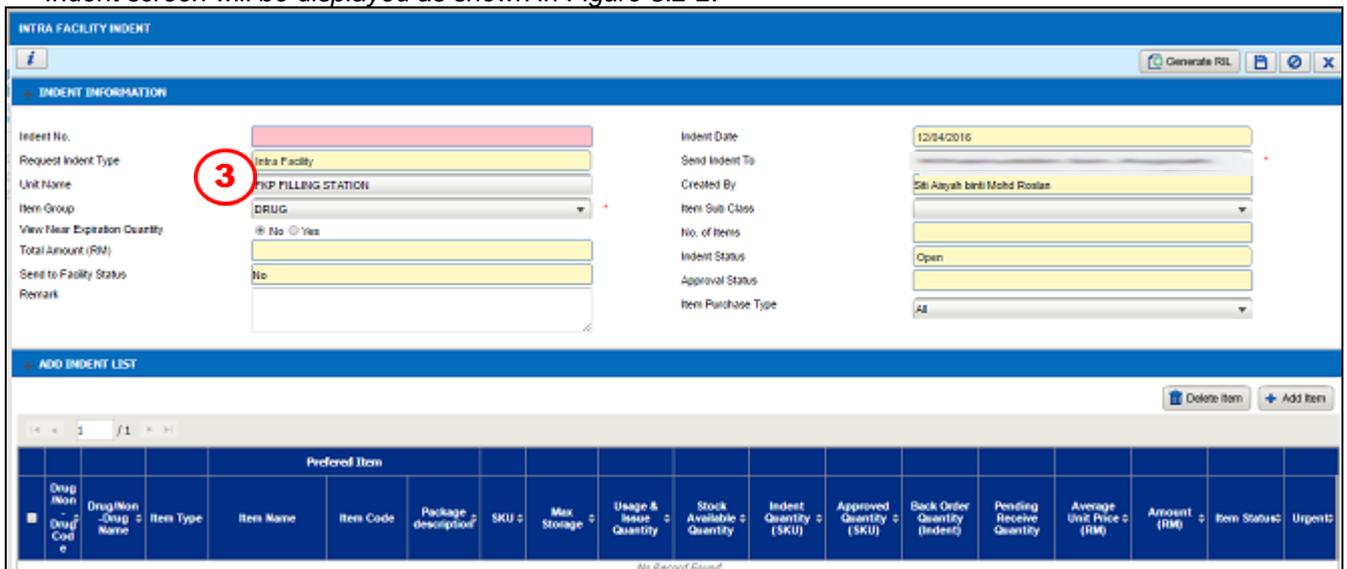
Figure 3.2-2 Create New Indent Information

- *New created Indent record **Status** is defaulted as 'Open'.*

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

- ***Indent Date** is defaulted to the system date and time.*

STEP 3
Select ***Item Group*** from dropdown box:
- Drug
- Non Drug

Note
- *User can only choose either Drug or Non Drug for the **Item Group** in one Indent transaction.*

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

- ***View Near Expiration Quantity** is defaulted to 'NO'.*

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

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

Figure 3.2-3 Recommended Indent List

STEP 4

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 5
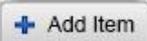
Click on the [+ Add Item] button to add an item to indent if the item is not listed from the [Generate RIL] button
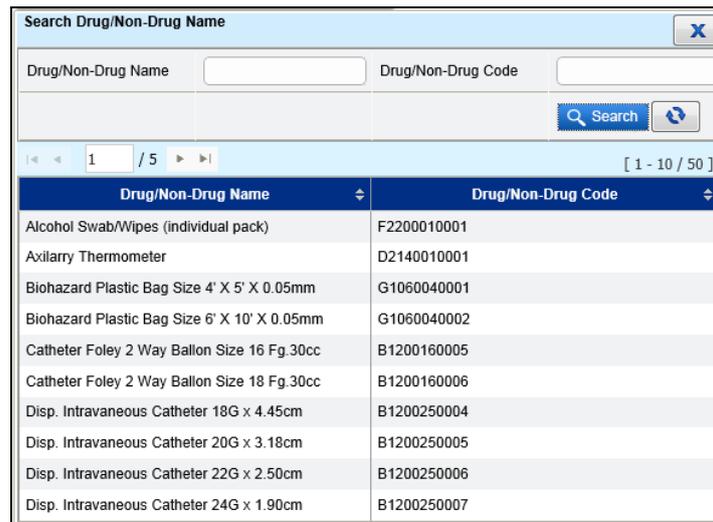

Figure 3.2-4 Add Indent Item

STEP 6

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

Note
*List of **Drug Name** will be displayed as shown in Figure 3.2-5.*

Figure 3.2-5 Drug Name List

STEP 7
Enter the *preferred item* to be indent
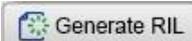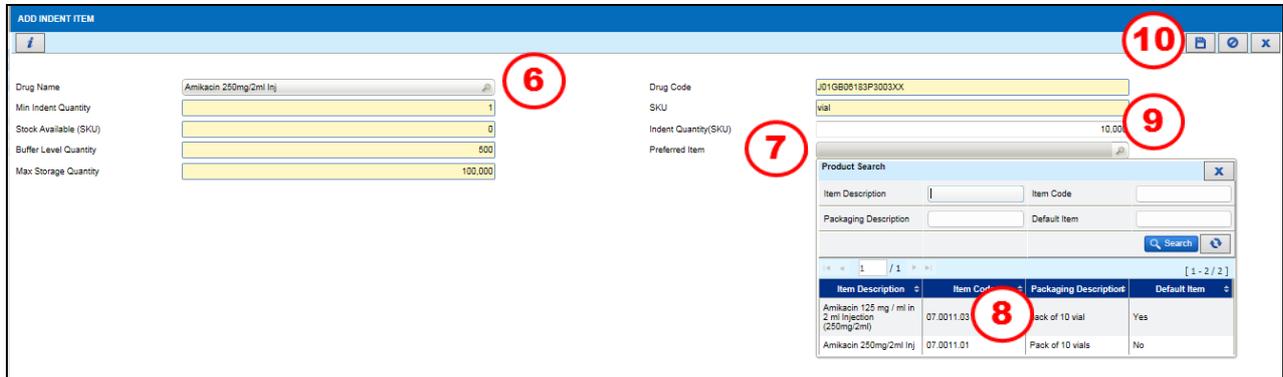
Note
Preferred Item listing is displayed together with:
-Item Description,
-Item Code,
-Packaging Description, and
-Item Status (Default: Y/N).

STEP 8
Double click on the *preferred item.*

STEP 9
Enter the *Indent Quantity(SKU)*

STEP 10

Click on the 💾 button to save the Add Indent Item

Note

- *After clicking save, an alert message will be displayed as per Figure 3.2-6, click on the* Yes *button to confirm saving of the record.*

CONFIRMATION

CONF0002: Are you sure you want to save?

Cancel   Yes   No
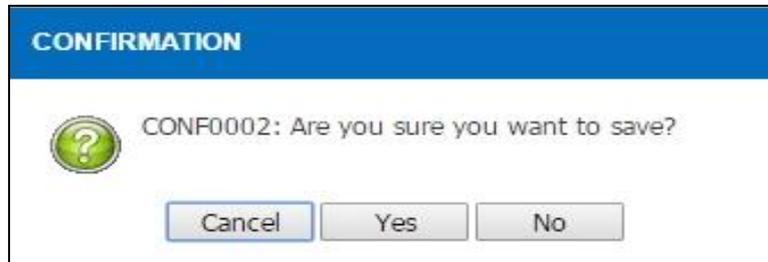
Figure 3.2-6 Save Record Alert Message

- *User will be redirected to the Indent Information screen as shown in Figure 3.2.7.*

Figure 3.2-7 Indent List

STEP 11

Change the quantity to indent in the ***Indent Qty*** field if required

Note

If the drugs are urgently required, select on the ***Urgent*** checkbox.

STEP 12

Click on the 💾 button to save the Indent transaction

Note

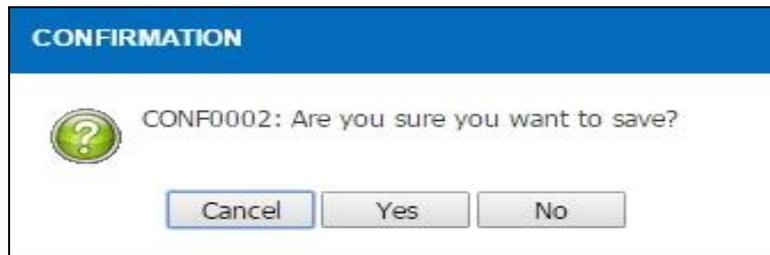After clicking save, an alert message will be displayed as per Figure 3.2-8 and Figure 3.2-9.
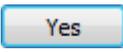
Figure 3.2-8 Save Record Alert Message

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

Figure 3.2-9 Save Record Alert Message

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

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

Character	Description	Value
1-2	Indent No	'K'
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 3.2-1

	Drug /Non Drug Cod e	Drug/Non-Drug Name	Item Type	Item Name	Item Code	Package description	SKU	Max Storage	Usage & Issue Quantity	Stock Available Quantity	Indent Quantity (SKU)	Approved Quantity (SKU)	Back Order Quantity (Indent)	Pending Receive Quantity	Average Unit Price (RM)	Amount (RM)	Item Status	Urgent
☐	D04 AX0 0000 G10 01X X	Calamine Cream	APPL	Calamine Cream	01.0401.06	tube of 25 gram	g	300	0	100	100	100	0	0	0.0225	2.25	Open	☐
☐	L02A E040 00P2 001X X	Triptorelin 3.75 mg injection	LP	Triptorelin 3.75 mg Inj	L02AE04000P 2001XX.01	Prefilled Syringe	PFSy	12	0	0	10	10	0	0	309.0000	3,090.00	Open	☐

Figure 3.2-10 Send for Approval

STEP 13

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]
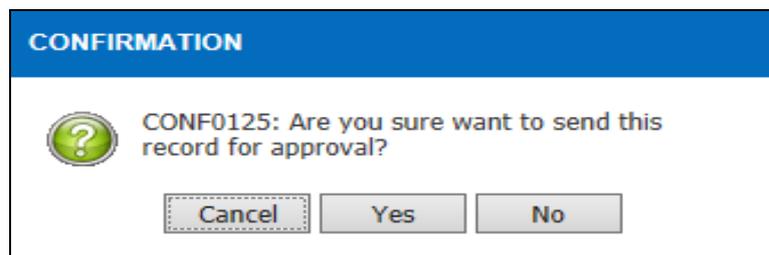
Figure 3.2-11 Send For Approval Record Alert Message

- *Click on the [OK] button to confirm the request to be sent for approval.*
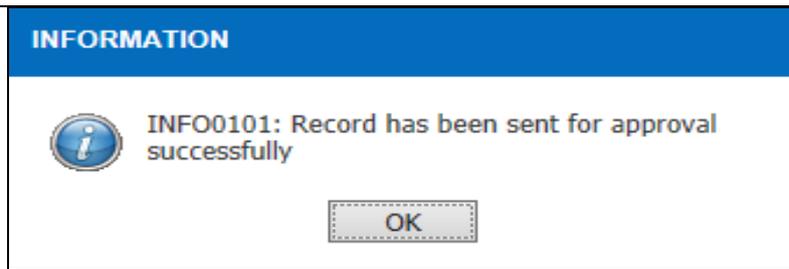
Figure 3.2-12 Alert Message

3.3 Indent (Intra Facility) Approval

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

Figure 3.3-1 Task List

STEP 1

Click on the Transaction No. hyperlink and the Indent screen will be displayed as shown in Figure 3.3-1

Note
User may also refer to section 3.1 Indent Listing Page to search for the 'Pending for Approval' Indent records.

Figure 3.3-2 Indent Approval

STEP 2

Change the Indent **Approved Quantity** if necessary

Note

- **Approved Quantity** *will default to indent quantity but Head of Department (HOD) is allowed to change the quantity.*
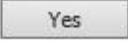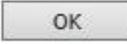
- *User is allowed to perform the following:*

  a) *Add new indent item by clicking on the* **+ Add New Item** *button*

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

STEP 3
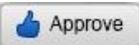
Click on the [👍 Approve] button to approve the Indent record and the *Status* will be 'Approved'

Note

- *Click on the* [Yes] *button in Figure 3.3-3 followed by the* [OK] *button in Figure 3.3-4.* [Disseminate]
  button will be enabled for the user to proceed with disseminate process.

CONFIRMATION

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

[Cancel]   [Yes]   [No]
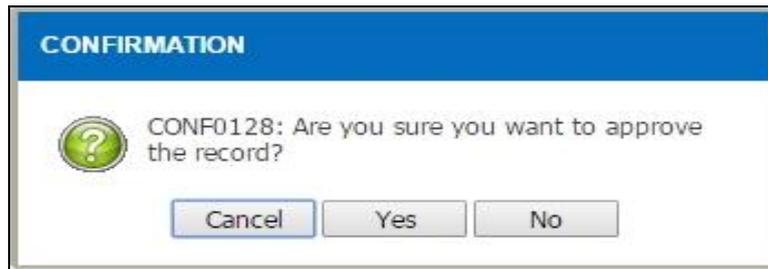
Figure 3.3-3 Approve Record Alert Message

INFORMATION

INFO0673: Record approved successfully and Send for eP Approval.

[OK]

Figure 3.3-4 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-11] *button will be enabled.*

- *If the indent is done at the main store,* [KEW.PS-10] *button will be enabled.*
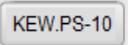
- *Approved Indent will flow to the supplying unit to proceed with the issuing process.*

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

Figure 3.3-5 KEW.PS-10 Button

STEP 4

Click on the [KEW.PS-10] button to generate the report as shown in Figure 3.3-5

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

Figure 3.3-6 KEW.PS-10 Print out

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