

Mass Requisitions

Functions:

[Search](#)

[View](#)

[Create](#)

[Update](#)

Business context

The Mass Requisition functionality allows a user to create, approve, and pick multiple requisitions at once. This is useful for allocation of Influenza vaccines and distributing vaccine in a pandemic.

Triggers

- Need to requisition for Influenza pre-allocation.
- Need to requisition for a pandemic.
- Need to distribute any vaccine to multiple sites.

Business Roles

Mass Requisitions is an Inventory Replenishment function. The functionality will be performed most frequently by the Zone Biological Coordinators and the Admin support staff who provide back-up.

Panorama Role

The Mass Requisitions permissions cover both the Inventory Zone and the Inventory Provincial roles.



Mass Requisitions can be created by Forecast or a Manual process. For HPs with no historical data the user may assign a manual quantity to the requisition. Currently, Nova Scotia Mass Requisitions will be created manually, not by forecast. In the future, the forecast functionality may be used.

Steps: Search

Overview Steps: Inventory Replenishment>Mass Requisitions>Search

1. Select Inventory Replenishment, then Mass Requisitions from the Left-Hand Navigation Menu.
2. The **Mass Requisitions Search** screen displays.
3. For an open search of all Mass Requisitions in the system, do not add criteria.
4. Click **Search**.
5. Results will display in the **Mass Requisitions Search Results** section.

Mass Requisition Search
⌵

Mass Requisition Id: <input type="text" value="3"/>	Mass Requisition Status: <input type="text"/>
Catalogue Item Code: <input type="text"/>	Catalogue Item Alternate Id: <input type="text"/>
Holding Point Type: <input type="text"/>	Holding Point Eligibility Group: <input type="text"/>
Requested Delivery Date From: <input type="text"/> / <input type="text"/> / <input type="text"/>	Requested Delivery Date To: <input type="text"/> / <input type="text"/> / <input type="text"/>
Mass Requisition Description: <input type="text"/>	Replenishment Holding Point: <input type="text"/> Search

Override holding point security

Mass Requisition Search Results
⌵

Mass Requisition Id	Catalogue Item(s)	Catalogue Item Alternate Id(s)	Mass Requisition Status	Mass Requisition Description
3	Pneu-P-23 0.5mL Vial (10/Box)	Pneu-P-23(10)	Shipped	-

Total: 1 Page 1 of 1 Jump to page:

Steps: View

Overview Steps: Search> Click Requisition Id>View>Cancel

1. Complete a search, following the Mass Requisitions process.
2. To view the Mass Requisition, click on the Mass Requisition Id.
3. View the Mass Requisition, including the catalogue items and list of requisitions.
4. In the **Mass Requisition Summary** section, click the **Requisition Id** hyperlink of the record to view details about each requisition.

Mass Requisition Summary
⌵

Row Actions:

No Filter

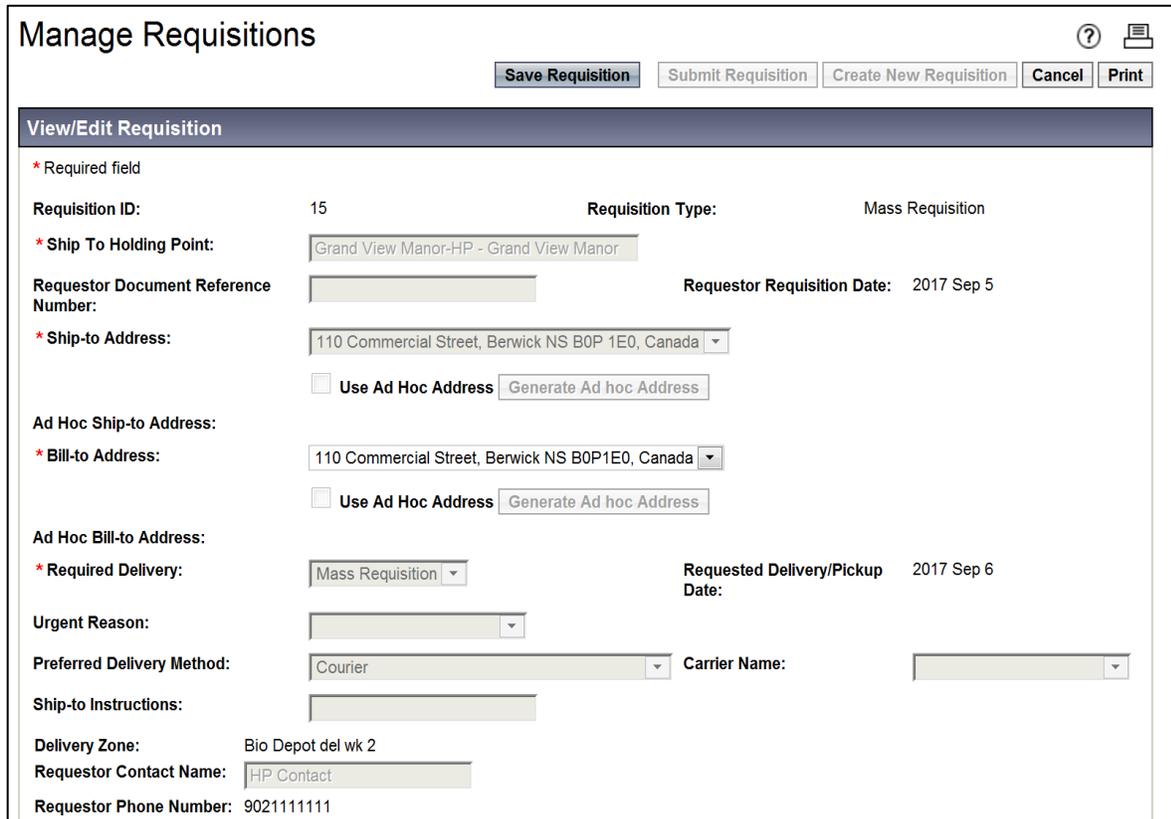
Filter by minimum quantity

Filter by Requestor Holding Point

	Requisition Id	Requestor Holding Point	Holding Point Name	Requested Delivery/Pickup Date	Packing Slip Comment	Requisition Status	Number of Containers
<input type="checkbox"/>	15	Grand View Manor-HP	Grand View Manor	2017 Sep 6	-	Pending Pick	-
<input type="checkbox"/>	16	Evergreen Home for Special Care-HP	Evergreen Home for Special Care	2017 Sep 6	-	Pending Pick	-
<input type="checkbox"/>	17	Annapolis Royal Nursing Home Limited -HP	Annapolis Royal Nursing Home Limited	2017 Sep 6	-	Pending Pick	-

Total: 3 Page 1 of 1 Jump to page:

5. The View/Edit Requisitions screen displays.
 - Review the address, the Delivery Zone, Preferred Delivery Method, and Requested Delivery/Pick-up Date.



Manage Requisitions [?] [Print]

[Save Requisition] [Submit Requisition] [Create New Requisition] [Cancel] [Print]

View/Edit Requisition

* Required field

Requisition ID: 15 Requisition Type: Mass Requisition

* Ship To Holding Point: Grand View Manor-HP - Grand View Manor

Requestor Document Reference Number: [] Requestor Requisition Date: 2017 Sep 5

* Ship-to Address: 110 Commercial Street, Berwick NS B0P 1E0, Canada [v]
 Use Ad Hoc Address [Generate Ad hoc Address]

Ad Hoc Ship-to Address:

* Bill-to Address: 110 Commercial Street, Berwick NS B0P1E0, Canada [v]
 Use Ad Hoc Address [Generate Ad hoc Address]

Ad Hoc Bill-to Address:

* Required Delivery: Mass Requisition [v] Requested Delivery/Pickup Date: 2017 Sep 6

Urgent Reason: [v]

Preferred Delivery Method: Courier [v] Carrier Name: [v]

Ship-to Instructions: []

Delivery Zone: Bio Depot del wk 2

Requestor Contact Name: HP Contact []

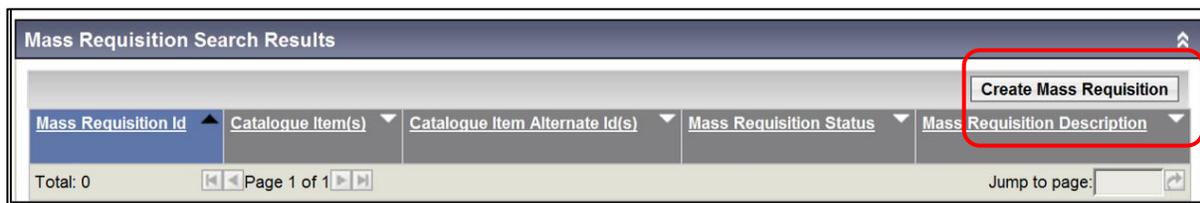
Requestor Phone Number: 9021111111

6. Click **Cancel** when finished viewing.

Steps: Create

Overview Steps: Search> Click **Create Mass Requisition**>Add Replenishment Holding Point> Save> Add Catalogue Items> Add Holding Points>Save> Add New Quantity> Save>Approve>Pick>Pack>Ship

1. Complete a search following the Mass Requisitions search process.
2. Click the **Create Mass Requisition** button.



Mass Requisition Search Results

Mass Requisition Id	Catalogue Item(s)	Catalogue Item Alternate Id(s)	Mass Requisition Status	Mass Requisition Description
[Create Mass Requisition]				

Total: 0 Page 1 of 1 Jump to page: []

3. Enter the Replenishment Holding Point for the Mass Requisition in the **Replenishment Holding Point** field.

Mass Requisition ?

(1) line item(s) have been created and added to the mass requisition and associated requisition(s).

* Maintain Mass Requisition ^

Mass Requisition Id	17	Earliest Status on this Mass Requisition	Draft
Forecast Percentage	<input type="text"/>		
Forecast Start Year	<input type="text" value="2017"/>	Forecast Start Period	<input type="text" value="Q1"/>
Forecast End Year	<input type="text" value="2017"/>	Forecast End Period	<input type="text" value="Q1"/>
Description	<input type="text"/>		
* Replenishment Holding Point	Wolfville PHO-HP		
Order Set	<input type="text"/>		
Apply Payer Code	<input type="text" value=""/> <input type="button" value="Apply Payer Code"/>		

4. Click **Save** at the bottom of the screen.

Mass Requisition Summary ^

Row Actions:

No Filter
 Filter by minimum quantity
 Filter by Requestor Holding Point

	Requisition Id	Requestor Holding Point	Holding Point Name	Requested Delivery/Pickup Date	Packing Slip Comment	Requisition Status	Number of Containers
Total: 0	Page 1 of 1						Jump to page: <input type="text"/>

5. A confirmation message displays on the Maintain Mass Requisition screen. The **Earliest Status on this Mass Requisition** field displays as Draft.

Mass Requisition

The mass requisition has been saved successfully.

*** Maintain Mass Requisition**

Mass Requisition Id	3	Earliest Status on this Mass Requisition	Draft
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6. Under the **Requisition Update Table**, click **Add Catalogue Item(s)**.

Requisition Update Table

Requester Requisition Date: / / * Requested Delivery/Pickup Date: / /

Packing Slip Comment:

Row Actions:

Catalogue Item Code	Catalogue Item Alternate Id	Catalogue Item Name	Forecast From	New Quantity	Minimum Quantity	Total Allocated Quantity	Quantity Available	Unit of Measure
<input type="button" value="Apply Updates"/> <input type="button" value="Clear"/>								

7. The Catalogue Item Search screen displays. Search for the Mass Requisition product, select the product, and click **Add Catalogue Item(s)**.

Catalogue Item Information

Catalogue Item Search

Search/Add Catalogue Item - Search Required Before Adding

Catalogue Item Code: Product Alternate ID:

Catalogue Item Status: Find Search String:

Level 1 - Category: Vaccines

Level 2 - Product Group: Pneu-P-23

Level 3 - Generic Product Strength: Pneu-P-23 0.5mL

Level 4 - Generic Product Presentation: Pneu-P-23 0.5mL Vial

Level 5 - Generic Product Package Size: Pneu-P-23 0.5mL Vial (10/Box)

Search Results Returned

Your search criteria returned 1 result(s).

	Catalogue Item Code	Product Alternate ID	Catalogue Item Name	Catalogue Item Description	Catalogue Level	Current Catalogue Item Status
<input checked="" type="checkbox"/>	44	Pneu-P-23(10)	Pneu-P-23 0.5mL Vial (10/Box)	Pneumococcal Polysaccharide 23-Valent	5	Active

8. The Mass Requisition screen populates with the selection.

Mass Requisition

(1) line item(s) have been created and added to the mass requisition and associated requisition(s).

* Maintain Mass Requisition

Mass Requisition Id	17	Earliest Status on this Mass Requisition	Draft
Forecast Percentage	<input type="text"/>		
Forecast Start Year	<input type="text"/>	Forecast Start Period	<input type="checkbox"/>
Forecast End Year	<input type="text"/>	Forecast End Period	<input type="checkbox"/>
Description	<input type="text"/>		
* Replenishment Holding Point	Wolfville PHO-HP		
Order Set	<input type="text"/>		
Apply Payer Code	<input type="text"/> <input type="button" value="Apply Payer Code"/>		

Requisition Update Table

Requester Requisition Date	2017 / 09 / 28		* Requested Delivery/Pickup Date	2017 / 09 / 29	
	yyyy mm dd			yyyy mm dd	
Packing Slip Comment	<input type="text"/>				

Row Actions:

Catalogue Item Code	Catalogue Item Alternate Id	Catalogue Item Name	Forecast From	New Quantity	Minimum Quantity	Total Allocated Quantity	Quantity Available	Unit of Measure
<input type="checkbox"/>	44	Pneu-P-23(10) Pneu-P-23 0.5mL Vial (10/Box)	-	<input type="text"/>	<input type="text"/>	0.0	0.0	Doses

9. Next, add Holding Points to the Mass Requisitions. Under the **Mass Requisitions Summary**, which is located directly under the Requisition Update Table, click on the **Add Holding Point(s)** button.

Mass Requisition Summary

Row Actions:

No Filter
 Filter by minimum quantity
 Filter by Requestor Holding Point

10. The **Holding Point Profile** screen displays.

11. Add your organization to the **Organization** field.

12. Search for the holding points to add to the Mass Requisition. More than one Holding Point may be selected and added.
13. Select the holding points and click the **Add Holding Points** button.

Holding Point Profile Results Hide Holding Point Profile Results				
Your search criteria returned (9) result(s).				
<input type="button" value="Select All"/> <input type="button" value="Deselect All"/>				
Row Actions: <input type="button" value="Copy"/> <input type="button" value="Add Holding Points"/> <input type="button" value="Return"/> <input type="button" value="Update"/> <input type="button" value="Create"/>				
<input type="button" value="Change Parameters for multiple Holding Points"/>				
Holding Point	Secondary HP Name	HP Status	Ship from/return to	HP Type
<input checked="" type="checkbox"/> Annapolis Royal Nursing Home Limited -HP - Annapoli...	-	Active	9745 St. George Street Lequille B0S1A0	Long-Term Care Facility
<input type="checkbox"/> Blomdon Court-HP - Blomdon Court	-	Active	58 Jessicas Way Greenwich B4P0B2	Long-Term Care Facility
<input checked="" type="checkbox"/> Evergreen Home for Special Care-HP - Evergreen Hom...	-	Active	655 Park Street Kentville B4N3V7	Long-Term Care Facility
<input type="checkbox"/> Grace Haven-HP - Grace Haven	-	Active	9791 Highway 1 Bridgetown B0S1C0	Long-Term Care Facility
<input checked="" type="checkbox"/> Grand View Manor-HP - Grand View Manor	-	Active	110 Commercial Street Berwick B0P1E0	Long-Term Care Facility

14. The holding points are added to the Mass Requisition.

Mass Requisition Summary							
Row Actions: <input type="button" value="Select All"/> <input type="button" value="Deselect All"/> <input type="button" value="Expand All"/> <input type="button" value="Collapse All"/>							
<input type="button" value="Add Holding Point(s)"/> <input type="button" value="Recalculate Quantities"/> <input type="button" value="Cancel Requisition(s)"/>							
<input type="button" value="Pack"/> <input type="button" value="Ship"/> <input type="button" value="Reset to Packed"/> <input type="button" value="Return to Draft"/>							
<input checked="" type="radio"/> No Filter <input type="radio"/> Filter by minimum quantity <input type="radio"/> Filter by Requestor Holding Point <input type="text"/>							
Requisition Id	Requestor Holding Point	Holding Point Name	Requested Delivery/Pickup Date	Packing Slip Comment	Requisition Status	Number of Containers	
<input type="checkbox"/> +	Grand View Manor-HP	Grand View Manor	-	-	Draft	-	
<input type="checkbox"/> +	Evergreen Home for Special Care-HP	Evergreen Home for Special Care	-	-	Draft	-	
<input type="checkbox"/> +	Annapolis Royal Nursing Home Limited -HP	Annapolis Royal Nursing Home Limited	-	-	Draft	-	
Total: 3			Page 1 of 1		Jump to page: <input type="text"/>		
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Approve"/> <input type="button" value="Pick"/> <input type="button" value="Cancel"/>							

15. Click **Save** at the bottom of the screen. A confirmation message displays.
16. Select the Catalogue line item and enter the amount for the requisitions under **New Quantity** in the **Requisition Update Table** section. Add a minimum quantity.

★	For a Mass Requisition, the same number of product doses is applied to all the requisitions in the Mass Requisition.
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Mass Requisition Summary

Row Actions:

No Filter

Filter by minimum quantity

Filter by Requestor Holding Point

Requisition Id	Requestor Holding Point	Holding Point Name	Requested Delivery/Pickup Date	Packing Slip Comment	Requisition Status	Number of Containers
<input checked="" type="checkbox"/>	Annapolis Royal Nursing Home Limited-HP	Annapolis Royal Nursing Home Limited	2017 Sep 29	-	Draft	-
Catalogue Item Code	Catalogue Item Alternate Id	Catalogue Item Name	Catalogue Item Description	Payer Code	Allocated Quantity	Unit of Measure
000000000044	Pneu-P-23(10)	Pneu-P-23 0.5mL Vial (10/Box)	Pneumococcal Polysaccharide 23-Valent	-	3.0	Doses
<input checked="" type="checkbox"/>	Evergreen Home for Special Care-HP	Evergreen Home for Special Care	2017 Sep 29	-	Draft	-
Catalogue Item Code	Catalogue Item Alternate Id	Catalogue Item Name	Catalogue Item Description	Payer Code	Allocated Quantity	Unit of Measure
000000000044	Pneu-P-23(10)	Pneu-P-23 0.5mL Vial (10/Box)	Pneumococcal Polysaccharide 23-Valent	-	3.0	Doses
<input checked="" type="checkbox"/>	Grand View Manor-HP	Grand View Manor	2017 Sep 29	-	Draft	-
Catalogue Item Code	Catalogue Item Alternate Id	Catalogue Item Name	Catalogue Item Description	Payer Code	Allocated Quantity	Unit of Measure
000000000044	Pneu-P-23(10)	Pneu-P-23 0.5mL Vial (10/Box)	Pneumococcal Polysaccharide 23-Valent	-	3.0	Doses

Total: 3 Page 1 of 1 Jump to page:

Nice to Know - Other Information Specific to Mass Requisitions

- No action is needed. This information will be added to Panorama.
- A **Preferred Delivery Method** must be recorded in the holding point profile.
- A **Delivery Zone** must be selected on the **Holding Point Profile**.

23. Click **Save**.

24. Select all the requisitions and click the **Submit** button. A confirmation message will display.

Mass Requisition



The mass requisition has been saved successfully.
The mass requisition has been successfully submitted.

25. The Earliest Status on this Mass Requisition has changed to Pending Approval.

Mass Requisition Summary

Row Actions:

No Filter

Filter by minimum quantity

Filter by Requestor Holding Point

		Requisition Id	Requestor Holding Point	Holding Point Name	Requested Delivery/Pickup Date	Packing Slip Comment	Requisition Status	Number of Containers
<input checked="" type="checkbox"/>	<input type="checkbox"/>	115	Grand View Manor-HP	Grand View Manor	2017 Sep 29	-	Pending Approval	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	116	Evergreen Home for Special Care-HP	Evergreen Home for Special Care	2017 Sep 29	-	Pending Approval	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	117	Annapolis Royal Nursing Home Limited-HP	Annapolis Royal Nursing Home Limited	2017 Sep 29	-	Pending Approval	-

Total: 3 Page 1 of 1 Jump to page:

26. To approve the Mass Requisition, select the requisitions and click the **Approve** button at the bottom of the screen.

27. An approval confirmation message displays.

Mass Requisition ? 🖨

The mass requisition has been saved successfully.

The mass requisition and requisition(s) were successfully approved.

28. The Pick button is enabled at the bottom of the screen next to **Approve**.

Mass Requisition Summary

Row Actions:

No Filter

Filter by minimum quantity

Filter by Requestor Holding Point

		Requisition Id	Requestor Holding Point	Holding Point Name	Requested Delivery/Pickup Date	Packing Slip Comment	Requisition Status	Number of Containers
<input checked="" type="checkbox"/>	<input type="checkbox"/>	115	Grand View Manor-HP	Grand View Manor	2017 Sep 29	-	Pending Pick	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	116	Evergreen Home for Special Care-HP	Evergreen Home for Special Care	2017 Sep 29	-	Pending Pick	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	117	Annapolis Royal Nursing Home Limited-HP	Annapolis Royal Nursing Home Limited	2017 Sep 29	-	Pending Pick	-

Total: 3 Jump to page:

29. Select the requisitions and click **Pick**.

30. A confirmation message displays stating the mass requisitions have been picked. The status changes to Picked.

31. In the Mass Requisition Summary section, check the checkbox for each requisition to be packed. Optionally, click the **Select All** button to select all requisitions.

32. Click **Pack**.

Mass Requisition Summary

Row Actions:

No Filter

Filter by minimum quantity

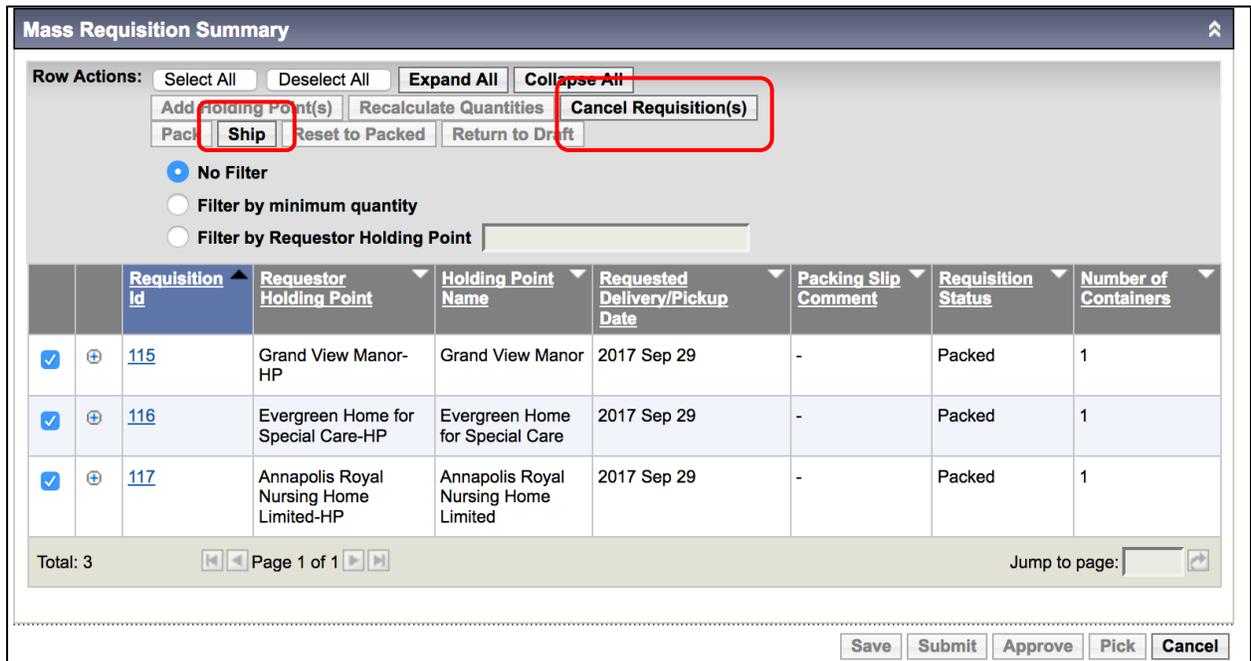
Filter by Requestor Holding Point

		Requisition Id	Requestor Holding Point	Holding Point Name	Requested Delivery/Pickup Date	Packing Slip Comment	Requisition Status	Number of Containers
<input checked="" type="checkbox"/>	<input type="checkbox"/>	115	Grand View Manor-HP	Grand View Manor	2017 Sep 29	-	Picked	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	116	Evergreen Home for Special Care-HP	Evergreen Home for Special Care	2017 Sep 29	-	Picked	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	117	Annapolis Royal Nursing Home Limited-HP	Annapolis Royal Nursing Home Limited	2017 Sep 29	-	Picked	-

Total: 3 Jump to page:

★ Since packing and shipping a large set of requisitions may occur over a number of days, these two functions may be applied to individual requisitions.

33. The screen is redisplayed with a message confirming the record is saved. The selected requisitions are packed and the status of the requisitions is updated to Packed.



Mass Requisition Summary

Row Actions:

No Filter
 Filter by minimum quantity
 Filter by Requestor Holding Point

	Requisition Id	Requestor Holding Point	Holding Point Name	Requested Delivery/Pickup Date	Packing Slip Comment	Requisition Status	Number of Containers
<input checked="" type="checkbox"/>	115	Grand View Manor-HP	Grand View Manor	2017 Sep 29	-	Packed	1
<input checked="" type="checkbox"/>	116	Evergreen Home for Special Care-HP	Evergreen Home for Special Care	2017 Sep 29	-	Packed	1
<input checked="" type="checkbox"/>	117	Annapolis Royal Nursing Home Limited-HP	Annapolis Royal Nursing Home Limited	2017 Sep 29	-	Packed	1

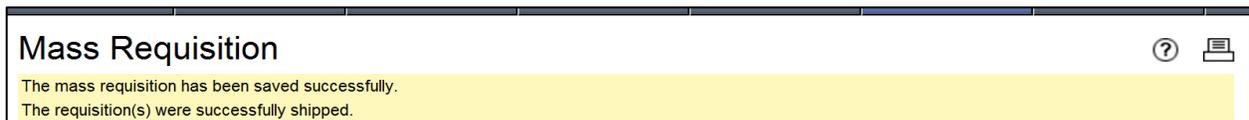
Total: 3 Page 1 of 1 Jump to page:

34. In the Mass Requisition Summary section, select the check box for each requisition to be shipped. Optionally, click the **Select All** button to select all the available lines.

35. A requisition may also be cancelled at this point. To cancel a requisition, select the requisition and click **Cancel Requisition(s)**.

36. Click the **Ship** button once the product has been picked up by the courier or the provider. If the product has been picked up for delivery to a Transit Point, Ship is also selected.

37. The screen is redisplayed with a message confirming the record is saved. The selected requisitions are shipped and the status of those requisitions is updated to Shipped.



Mass Requisition ? 🖨

The mass requisition has been saved successfully.
 The requisition(s) were successfully shipped.

Steps: Update

Overview Steps: Search>Click Requisition ID>Make updates

1. Search for the Mass Requisition following the search process.
2. In the **Mass Requisition Search Results** section, click the **Mass Requisition Id** hyperlink of the record.
3. A requisition in Shipped Status may be changed back to Packed status by clicking **Reset to Packed**.

Mass Requisition Summary

Row Actions:

No Filter

Filter by minimum quantity

Filter by Requestor Holding Point

		Requisition Id	Requestor Holding Point	Holding Point Name	Requested Delivery/Pickup Date	Packing Slip Comment	Requisition Status	Number of Containers
<input type="checkbox"/>	<input type="checkbox"/>	98	Oakwood Terrace-HP	Oakwood Terrace	2017 Sep 29	-	Cancelled	-
<input type="checkbox"/>	<input type="checkbox"/>	99	Parkland at the Gardens-HP	Parkland at the Gardens	2017 Sep 29	-	Cancelled	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	100	Saint Vincent's Nursing Home-HP	Saint Vincent's Nursing Home	2017 Sep 29	-	Shipped	1

4. Once Reset to Packed, it can be cancelled or Shipped (of for some reason it was returned and did go to the destination).

Mass Requisition Summary

Row Actions:

No Filter

Filter by minimum quantity

Filter by Requestor Holding Point

		Requisition Id	Requestor Holding Point	Holding Point Name	Requested Delivery/Pickup Date	Packing Slip Comment	Requisition Status	Number of Containers
<input type="checkbox"/>	<input type="checkbox"/>	98	Oakwood Terrace-HP	Oakwood Terrace	2017 Sep 29	-	Cancelled	-
<input type="checkbox"/>	<input type="checkbox"/>	99	Parkland at the Gardens-HP	Parkland at the Gardens	2017 Sep 29	-	Cancelled	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	100	Saint Vincent's Nursing Home-HP	Saint Vincent's Nursing Home	2017 Sep 29	-	Packed	1

Total: 3 Page 1 of 1

Jump to page:

5. If the Mass Requisition is in Draft Status:
 - Catalogue Items may be added or cancelled.
 - Holding Points may be added.
 - Requisitions may be cancelled.

Requisition Update Table

Requester Requisition Date: / / yyyy mm dd * Requested Delivery/Pickup Date: / / yyyy mm dd

Packing Slip Comment:

Row Actions:

	Catalogue Item Code	Catalogue Item Alternate Id	Catalogue Item Name	Forecast From	New Quantity	Minimum Quantity	Total Allocated Quantity	Quantity Available	Unit of Measure
<input checked="" type="checkbox"/>	24	HPV-4(10)	HPV-4 0.5mL Vial (10/Box)	-	<input type="text"/>	<input type="text"/>	0.0	1,275.0	Doses

Mass Requisition Summary

Row Actions:

No Filter
 Filter by minimum quantity
 Filter by Requestor Holding Point

	Requisition Id	Requestor Holding Point	Holding Point Name	Requested Delivery/Pickup Date	Packing Slip Comment	Requisition Status	Number of Containers
<input checked="" type="checkbox"/>	78	The Magnolia-HP	The Magnolia	-	-	Draft	-

6. Click the **Save** button.