

Product Requisitions – Manage Requisitions

Functions:

[Search](#)

[View](#)

[Create Requisition](#)

[Update Requisition](#)

Business context

Public Health Offices order product from the Bio Depot and from each other. They also fill orders for providers such as physicians, hospitals/facilities, and pharmacies. The Manage Requisitions section is focused on the creation of product requisitions.

Other functionality, including Approval, Pick, Pack, Ship, and Deliver will be addressed in separate User Guides.

Triggers for Manage Requisitions

- It is time for a zone public health office to submit its regular order to the Bio Depot.
- A product must be ordered from the Bio Depot, due to an emergency.
- An external provider has submitted an order to a public health office and the public health office must create the product requisition.
- A public health office would like to order product from another public health office.

Standard Operating Procedures (SOPs)

- Requisitioning and Shipping Products Between Holding Points

Business Roles

Product Requisitions is an inventory replenishment function. The Manage Requisitions functionality will be performed most frequently by the Zone Biological Coordinators and the Admin staff

Panorama Role

Permissions for the Product Requisition – Manage functionality are available to both the Inventory Zone and Inventory Provincial roles.

Requisition Status

The table below outlines the system status for each requisition action.

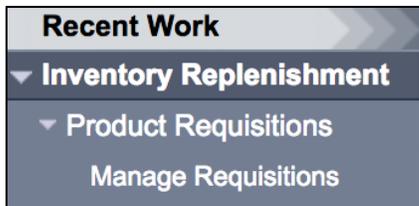
ACTION	STATUS	RESPONSIBLE FOR ACTION
Create and Save	Draft	Zone staff
Submit	Pending Approval, Pending Manual Approval	Zone staff
Authorize/Approve	Pending Pick	Replenishment source, e.g., Bio Depot for Zone orders or Main office for External

		requisitions and Public Health Office (PHO) to PHO orders.
Pick	Picked	Replenishment source, e.g., Bio Depot for Zone orders or Main office for External requisitions and PHO to PHO orders.
Pack	Packed	Replenishment source, e.g., Bio Depot for Zone orders or Main office for External requisitions and PHO to PHO orders.
Ship	Shipped	Replenishment source, e.g., Bio Depot for Zone orders or Main office for External requisitions and PHO to PHO orders.
Deliver	Delivered, Not Delivered	Main PHO or Transit Point HP to facilitate Delivery if product requisitions are for external providers.
Receive	Received	PHO

Steps: Search

Overview Steps: Inventory Replenishment>Product Requisitions>Manage Requisitions>Add criteria>Search

1. Select **Inventory Replenishment** from the Left-Hand Navigation menu> **Product Requisitions> Manage Requisitions**.



2. The **Search/Add Requisition Product** screen displays.

Manage Requisitions

Search / Add Requisition Product Hide Search / Add Requisition Product

Ship To Holding Point: [Search](#)

Ship From Holding Point:

Requisition Status:

Submit Date From: / /
yyyy mm dd

Submit Date To: / /
yyyy mm dd

Catalogue Item Code:

Catalogue Item Name:

Phone Number: () ext.

Pick Up By Name:

Invoice Status:

Requestor Document Reference Number:

Override Holding Point Security

Requisition ID:

Requisition Type:

Product Alternate ID:

Postal Code:

Payer Code:

Required Delivery:

3. Enter recommended search criteria.

- Requisition Status
- Requisition ID (if known)
- Ship To Holding Point
- Contact Phone Number

4. To populate the **Ship To Holding Point** field, type the name of the Holding Point in the **Holding Point** field.

5. Click the **Search** button.

6. Panorama displays the search results in the **Requisition/Product Search Results** section.

Requisition/Product Search Results

Hide Requisition/Product Search Results

Your search criteria returned 1 result(s).

[Create Requisition](#)

Requisition ID	Submit Date	Ship To Holding Point	Requisition Status	Exception	Required Delivery	Requested Delivery Date	Ship From Holding Point	Backorder Quantity
37	2017 Sep 13	Antigonish PHO-HP - Antigonish PHO	Pending Approval	No	Next scheduled	2017 Sep 14	Halifax PHO-HP	No

Total: 1 Page 1 of 1

Jump to page:

Steps: View

Overview Steps: Search> Select Requisition ID> View>Close Cancel

1. Follow the Manage Requisition Search process.
2. Review the results in the **Requisition/Product Search Results** section.

Requisition/Product Search Results ↑ Hide Requisition/Product Search Results								
Your search criteria returned 1 result(s).								
								Create Requisition
Requisition ID	Submit Date	Ship To Holding Point	Requisition Status	Exception	Required Delivery	Requested Delivery Date	Ship From Holding Point	Backorder Quantity
10	2017 Sep 1	Sydney PHO-HP - Sydney PHO	Received	No	Next scheduled	2017 Sep 2	Bio Depot-HP	No

3. Click on the **Requisition ID** hyperlink of the desired requisition to view the details.
4. The View/Edit Requisition screen displays. The following fields may be reviewed:
 - Ship to Holding Point
 - Ship-to-Address and the Bill-to-Address
 - Requestor contact
5. To view the history related to the requisition, click the **Show History** button.

View/Edit Requisition	
* Required field	
Requisition ID:	10
Requisition Type:	Regular
* Ship To Holding Point:	Sydney PHO-HP - Sydney PHO
Requestor Document Reference Number:	
Requestor Requisition Date:	2017 Sep 1
* Ship-to Address:	#2nd Floor - 235 Townsend Street, Sydney NS B1P5E7, Canada
	<input type="checkbox"/> Use Ad Hoc Address Generate Ad hoc Address
Ad Hoc Ship-to Address:	
* Bill-to Address:	#2nd Floor - 235 Townsend Street, Sydney NS B1P5E7, Canada
	<input type="checkbox"/> Use Ad Hoc Address Generate Ad hoc Address
Ad Hoc Bill-to Address:	
* Required Delivery:	Next scheduled
Requested Delivery/Pickup Date:	2017 Sep 5
Urgent Reason:	
Preferred Delivery Method:	Courier
Carrier Name:	
Ship-to Instructions:	
Delivery Zone:	
Requestor Contact Name:	HP Contact
Requestor Phone Number:	
Recipient:	
* Ship From Holding Point:	Bio Depot-HP - Bio Depot

★ On the View/Edit Requisition page, the **Show History** button provides users with information on Requisitions or a Requisition Item History, including Last Updated Date, Time, and User ID (user who made the update; status for each update.)

Manage Requisitions ? 🖨

Requisition History		
Last Updated Date and Time	User ID	Status
2017 Sep 1 18:52 ADT	ALL, kathym	Draft
2017 Sep 1 18:53 ADT	ALL, kathym	Pending Approval
2017 Sep 1 18:55 ADT	ALL, kathym	Pending Pick
2017 Sep 1 18:55 ADT	ALL, kathym	Picked
2017 Sep 1 18:56 ADT	ALL, kathym	Packed
2017 Sep 1 18:56 ADT	ALL, kathym	Shipped
2017 Sep 1 19:02 ADT	ALL, kathym	Received

6. Click **Close**.
7. To return to the search screen, click **Cancel**.

Steps: Create Requisition

★

- For requisitions submitted between two public health offices, the requesting public health office must create the requisition in Panorama.
- A public health office submits requisitions for orders to be filled by the Bio Depot and for External provider requisitions.

Overview Steps: Search> Create Requisition> Enter requisition information> Save Requisition> Add Catalogue Items> Submit Requisition> Confirmation

1. Follow the Manage Requisition Search process.
2. The **Holding Point** to receive the product is the **Ship To Holding Point**. To populate the **Ship To Holding Point** field, type the name in the **Ship To Holding Point field**.

Manage Requisitions

Search / Add Requisition Product Hide Search / Add Requisition Product

Ship To Holding Point:	<input type="text" value="Digby PHO-HP - Digby PHO"/> Search	Requisition ID:	<input type="text"/>
Ship From Holding Point:	<input type="text"/>	Requisition Type:	<input type="text"/>
Requisition Status:	<input type="text"/>	Submit Date To:	<input type="text"/>
Submit Date From:	<input type="text"/> / <input type="text"/> / <input type="text"/>		<input type="text"/> / <input type="text"/> / <input type="text"/>
	yyyy mm dd		yyyy mm dd
Catalogue Item Code:	<input type="text"/>	Product Alternate ID:	<input type="text"/>
Catalogue Item Name:	<input type="text"/>		
Phone Number:	(<input type="text"/>) <input type="text"/> <input type="text"/> ext. <input type="text"/>	Postal Code:	<input type="text"/> <input type="text"/>
Pick Up By Name:	<input type="text"/>	Payer Code:	<input type="text"/>
Invoice Status:	<input type="text"/>	Required Delivery:	<input type="text"/>
Requestor Document Reference Number:	<input type="text"/>		
Override Holding Point Security	<input type="checkbox"/>		

Requisition/Product Search Results

7. Click **Search**.
8. If the requisition is not identified, click the **Create Requisition** button.
9. The **Create New Requisition** screen displays.

Manage Requisitions

Requisition successfully saved.

View/Edit Requisition

*** Required field**

Requisition ID: 140 **Requisition Type:** Regular

*** Ship To Holding Point:**

Requestor Document Reference Number: **Requestor Requisition Date:** 2017 / 10 / 05 
yyyy mm dd

*** Ship-to Address:** 
 Use Ad Hoc Address

Ad Hoc Ship-to Address:

*** Bill-to Address:** 
 Use Ad Hoc Address

Ad Hoc Bill-to Address:

*** Required Delivery:**  *** Requested Delivery/Pickup Date:** 2017 / 10 / 06 
yyyy mm dd

*** Urgent Reason:** 

Preferred Delivery Method:  **Carrier Name:** 

Ship-to Instructions:

Delivery Zone:

Requestor Contact Name:

Requestor Phone Number: () ext.

Recipient:

*** Ship From Holding Point:** 

10. The following mandatory fields will be populated based on the selected **Ship to Holding Point**.

- Ship-to Address
- Bill-to Address
- Requestor contact name, as well as a telephone number if one is documented in Panorama
- Ship-From Holding Point

11. The **Requested Delivery/Pickup Date** will populate with the next day's date – this may be changed if required.

12. Select a **Required Delivery** option from the Dropdown menu.

- In Nova Scotia, select between Next Delivery and Urgent.
- If **Urgent** is selected, the **Urgent Reason** dropdown menu is enabled. An **Urgent Reason** must be selected.

Shipped Comments: -

Requisition Item Summary View

	Product Alternate ID:	Catalogue Item Name:	List Price	Requester QOH:	Average Monthly Demand:	Requisition Quantity:	Approved Quantity:	Requisition Line Item Status:

13. Click the **Save Requisition** button. This allows a user to complete the requisition at a later time, without losing information.

14. The system displays a “Requisition successfully saved” notification.

Manage Requisitions ? 

Requisition successfully saved.

15. A Requisition ID is generated.

- **HINT:** If completing the requisition later, mark the requisition ID down on a piece of paper to make it easier to find.

16. The status changes to Draft.



Best Practice: Search for Requisitions in “Draft” status on a regular basis to ensure requisitions that can be submitted are not sitting in draft status.

17. After saving the requisition in “Draft” status, Click the **Add Catalogue Item(s)** button to add product to the requisition.



Diluent

- When ordering vaccines that require diluent, do not order diluent separately. Diluent will be included with the vaccine order.
- If extra diluent is required, then it may be ordered.

18. The **Catalogue Item Search** screen is displayed.

19. Add the Catalogue search criteria.

- Only Active items will be returned in the search.

20. The search result(s) are displayed. Select the required items next to the Catalogue Item Code. Click the Add Catalogue **Item(s)** button.

- **TIP:** More than one product may be selected at the same time.

Catalogue Item Information

Catalogue Item Search

Search/Add Catalogue Item - Search Required Before Adding

Catalogue Item Code:

Product Alternate ID:

Catalogue Item Status: Active
Discontinued
Inactive

Find Search String:

Order Set Name:

Level 1 - Category:

Level 2 - Product Group:

Level 3 - Generic Product Strength:

Level 4 - Generic Product Presentation:

Level 5 - Generic Product Package Size:

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 type="checkbox"/> 45	PPD(MDV)	PPD 1mL MDV	PPD-Tuberculin	5	Active

21. A message about the Replenishment of Inventory Group A displays. It does not impact the order.

Manage Requisitions

Replenishment of [Inventory Group]=A products should be managed using its replenishment plan: 45 PPD(MDV)

22. The **Maintain Requisition –View/Edit** screen displays. The Catalogue Item will appear in the **Requisition Item Summary View** section of the screen. Select the product(s), then enter the **Requisition Quantity** for each line item.

A Level 6 trade name cannot be selected on the requisition, only a generic Level 5 product. To request a specific trade name product, add this information in the **Line Item Requestor Comment** field.

Requisition Item Summary View

Select All Deselect All Expand All Collapse All

Reconcile Remove Line Item(s) Reset Invoice Status

	Product Alternate ID:	Catalogue Item Name:	List Price	Requester QOH:	Average Monthly Demand:	Requisition Quantity:	Approved Quantity:	Requisition Line Item Status:
<input checked="" type="checkbox"/>	PPD(MDV)	PPD 1mL MDV	-	0.0	0.0	10		-

Save Requisition **Submit Requisition** Print

Cancel Entire Requisition Create New Requisition Cancel

23. Click the **Submit Requisition** button.
24. Confirmation to proceed displays.

Only selected Requisition Line Items will be submitted - unselected items will be removed. Do you wish to proceed?

Cancel OK

25. Click **OK**. A confirmation message displays.
26. The system changes the requisition line item status to “Pending Approval”, and to “Pending Manual Approval” for urgent requisitions.

★ Once a requisition is in Pending Manual Approval or Pending Approval, catalogue items cannot be added or removed. Changes may be made in the Approval phase.

Requisition Packing Slip Comments: _____

Status: Pending Manual Approval Original Requisition ID: _____

Pick Up By Name: _____ Backordered Requisition ID(s): _____

Actual Shipped Date: -

27. The system will display an **Average Monthly Demand** message and “Requisition successfully saved” notification message in the header. This does not impact the order.

The requested quantity for the following Requisition Item has exceeded the average monthly demand: PPD(MDV), PPD 1mL MDV
 Average Monthly Demand of : 0.0
 Requisition successfully submitted.

★ **Average Monthly Demand** indicates the monthly average demand for each catalogue item, based on historical data from the public health office.

Steps: Update Requisition

Overview Steps: Search>Select requisition>Click Requisition ID> Modify> Save Requisition> OK

- ★
 - Users cannot modify the following parameters of a requisition in “**Draft**” status (all other fields may be modified, and Catalogue Items can be added or removed):
 - Ship To Holding Point
 - Ship From Holding Point
 - Users may only modify the following parameters of a requisition in “**Pending Approval**” and “**Pending Manual Approval**” status (no other fields can be modified, and Catalogue Items cannot be added or removed):
 - Required Delivery
 - Carrier Name
 - Ship-to Instructions
 - Recipient
 - Requisitions cannot be deleted, but may be cancelled.
 - Requisitions in “Draft” status, may be cancelled by clicking the **Cancel Entire Requisition** button from the Manage Requisitions screen.
 - Requisitions in “Pending Manual Approval” and “Pending Approval” status can be cancelled by clicking the **Cancel Entire Requisition** button from the Approve/Authorize screen.

1. Follow the Manage Requisition Search steps to retrieve a requisition to be updated.
2. Click the **Requisition ID** link.

Requisition/Product Search Results Hide Requisition/Product Search Results								
Your search criteria returned 1 result(s).								
								Create Requisition
Requisition ID	Submit Date	Ship To Holding Point	Requisition Status	Exception	Required Delivery	Requested Delivery Date	Ship From Holding Point	Backorder Quantity
16	-	Wolfville PHO-HP - Wolfville PHO	Draft	No	Next scheduled	2017 Aug 30	Bio Depot-HP	No

3. The **View/Edit Requisition** screen displays.

View/Edit Requisition

* Required field

Requisition ID: 16 Requisition Type: Regular

* Ship To Holding Point: Wolfville PHO-HP - Wolfville PHO

Requestor Document Reference Number: Requestor Requisition Date: 2017 / 08 / 29
yyyy mm dd

* Ship-to Address: 23 Earncliffe Avenue, Wolfville NS B4P1X4, Canada
 Use Ad Hoc Address

Ad Hoc Ship-to Address:

* Bill-to Address: 23 Earncliffe Avenue, Wolfville NS B4P1X4, Canada
 Use Ad Hoc Address

Ad Hoc Bill-to Address:

* Required Delivery: Next scheduled Requested Delivery/Pickup Date: 2017 Oct 12

Urgent Reason:

Preferred Delivery Method: Carrier Name:

Ship-to Instructions:

Delivery Zone:

Requestor Contact Name: HP Contact

Requestor Phone Number: () ext.

Recipient:

* Ship From Holding Point: Bio Depot-HP - Bio Depot

Comments:

Requisition Packing Slip Comments:

Status: Draft Original Requisition ID:

- Modify the requisition as needed. This example demonstrates updates to a product requisition in Draft Status. A catalogue item was added.

Requisition Item Summary View

Select All Deselect All Expand All Collapse All

Reconcile Remove Line Item(s) Reset Invoice Status

	Product Alternate ID:	Catalogue Item Name:	List Price	Requester QOH:	Average Monthly Demand:	Requisition Quantity:	Approved Quantity:	Requisition Line Item Status:
<input checked="" type="checkbox"/>	PPD(MDV)	PPD 1mL MDV	-	0.0	0.0	<input type="text" value="10"/>		-

Save Requisition **Submit Requisition** Print

Cancel Entire Requisition Create New Requisition Cancel

- Click **Submit Requisition**.
- Click OK.
- A confirmation message displays.