

Order Processing

The purpose of order processing is to create a batch consisting of the different drugs you need to purchase then place that batch on order with your wholesaler. Several steps will be taken in order to accomplish that goal. While the process may seem overwhelming, it really is very simple.

To use the order processing functions, you will need to:

- Set up the drug file.
- Create a batch.
- Check the order.
- Place a batch on order.
- Check the order in.

Each step is described below.

Setting up the Drug File:

To utilize the order processing function, certain items of information must be entered into your drug file. You will need to count your drugs individually and enter into the drug file at line 38 the on hand quantity you have for each drug. While in each drug record, determine the minimum on-hand quantity you want to keep on your shelf and enter that amount in field 40. You will also need to determine the minimum amount to be ordered whenever it is time to order that particular drug. Put that amount in field 41.

```
Drug File Maintenance - screen 1 Find
1* Drug CEPHALEXIN 250MG//
2* NDC# 00093314505 3* Schedule....
4* Med# Y 5* Price Tbl. 29
6* Pkg Qty.. 500 7* Unit Type: CAP
8* MetMult: 500.0 9. Exp(MMY) 103
10. MinDspQty 0 11. Updates? [Y] Y
12* AWP= $ 283.37 on 051201 14. [Y] Y
15. DIR= $ 172.00 on 020493 17. [Y] Y
18. MAC= $ 85.00 on 112800 20. [Y] Y
21. ACQ= $ 32.89 on 020901 23. [Y] Y
24. Price from (A)WP, (D)IR, AC(Q). [A] A
25. Brand or Generic?..... (B,G) G
26. DAW?/UDose code..... (B,I,M//T,U) N
27. Medicaid Override.. (Y, [N], I, M, R) N
28. Drug Manufacturer. LEMMON
29. Code
30. Pric
31. Couns: 7 ,5 ,15
35. Recommended SIG.....
----- Order Information -----
36. Vendor WALSH 37. Ord# 430199
38. On Hand 405 39. On Ord 0
40. Min O/H 200 41. Min Ord 0
-- Sales -- 42. Month to Date: 76
43. Jan 40 47. May 56 51. Sep 126
44. Feb 128 48. Jun 120 52. Oct 58
45. Mar 150 49. Jul 40 53. Nov 70
46. Apr 112 50. Aug 124 54. Dec 43

1. KEFLEX 250MG

Exit, Find, AddSame, Chg#, Del, Next, Prev, Word, nutrI, Medi-Span, Go#, UnLink, Other
3-nutrI 4-Find 5-Next 6-Prev 7-Add 8-Cons 9-Mono 10-PriFM
```

When the drug file is updated completely with on-hand, minimum on-hand, and minimum order quantities you are ready to create and process a diskette order for your wholesaler. Currently, the following wholesalers accept the order via diskette:

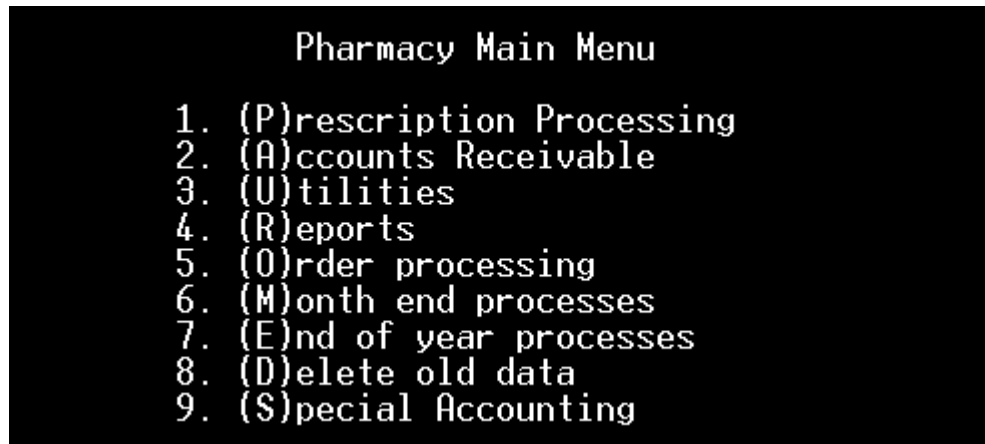
- AmeriSource
- Bergen
- Cardinal
- D and K
- McKesson
- Smith Data
- Walsh Dohmen

If you are using a wholesaler which is not in the above list, please contact them and see if they will work with us to set them up.

Getting Started:

To create and process an order to your wholesaler, you will need to do the following:

1. Go to the Pharmacy Main Menu.
2. Enter 5 or O (not zero, but the letter O) for Order Processing to enter the sub-menu used for processing an order.



Creating the Order:

To create an order, you will give the computer a range of months to determine the total dispensed quantities for those months. This total amount will be used to calculate an average use per day based upon how many days you want.

After the amount to be ordered is calculated, you will print a report to see if you want those items and quantities to be placed on order. You may make necessary corrections prior to placing the order. After all of the corrections are complete, you will place the batch on order. Detailed information for those procedures will be explained in the pages to follow.

First create the order batch. Do this by:

Enter 1 or C to Create an order batch. The following screen (without information entered in the fields) should now display.

```

                                Calculate Amount to Order
1. Beginning Drug Name A
2. Ending Drug Name... ZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZ
3. Beginning NDC #....
4. Ending NDC #.....

                    (Y/N)                               (Y/N)
5.  January       Y  [Y]                            11. July          N  [Y]
6.  February      Y  [Y]                            12. August        N  [Y]
7.  March          N  [Y]                            13. September    Y  [Y]
8.  April          N  [Y]                            14. October      Y  [Y]
9.  May            N  [Y]                            15. November     Y  [Y]
10. June           N  [Y]                            16. December    Y  [Y]
                                              17. Current      N  [Y]

18. Ignore if Average is less than package Quantity. (Y/N) [Y] Y

Enter Days Supply to Re-order 1-30 [7]
```

1. At “#1. Beginning Drug Name”, enter the letter A then hit enter. This will move you to field number 2 for the ending drug name.
2. At “#2. Ending Drug Name”, enter the letter Z numerous times (ZZZZZZZZZZ) and hit enter.

If you prefer using NDC numbers, you may do so by striking the space bar and hit enter while in field #1 where you are asked to enter the beginning drug name. You will be taken to field #3 where you will enter the NDC number you wish to begin with. After entering the NDC number and hitting enter, you will go to field #4 to enter the NDC number at which you wish to end. The rest of the process is the same as if you had entered beginning and ending drug names.

You now have the option of choosing which months to be included in the calculation process. Enter N for each month you do NOT want to include. Hit enter for those months you DO want to include. The computer will default to entering Y for you.

HINT: Use a minimum of 3 months for your calculation. This will allow you to get a good count on your “seasonal” items. In the example above, we are using 6 months for the calculation.

Remember that the months available for selection are PREVIOUS months. In the previous illustration we selected September through December of last year and January and February of this year. Based on the months selected, this is March so we do not wish to include the totals for March of last year. If you are at the end of the current month (in this example, March), you may wish to include it in the calculation by entering Y in field #17.

3. At “18. Ignore if Average is less than package Quantity.” hit enter. The computer will default to Y indicating that you want to ignore the average amount if it is less than the package quantity.
4. “Enter Days Supply to Re-order 1-30 [7]. Where the cursor is located, type the number of days supply you wish to have calculated. In the example, we are calculating the usage for 7 days supply. Enter the number of days you want calculated (1 - 30).
5. “Enter Vendor Code or <CR> if general Order”. If using multiple wholesalers and you wish to order from a specific wholesaler, enter the vendor code for that particular wholesaler and hit enter. If you do not use multiple wholesalers or if you do but wish to generate a complete order without reference to a specific wholesaler, hit enter to continue.
6. “Enter Unit Type (TAB, CAP, CC, EA, GM, OZ) or <CR> to Order All” - Hit enter to generate an order for all types of drugs. If you prefer to order a specific type, you may do so by entering that type and hitting enter.
7. “Enter Drug Code: Brand, Generic, Multi-Source, Non-Drug or <CR> to Order All” - Hit enter to order all. If you prefer to order a specific code, you may do so by entering that code and hitting enter.
8. “Exit, Restart or, Shall I begin? (Y/N)” - Type Y then hit enter to start the calculation process. If you respond with E to exit, you will be taken from this screen to the menu. The job will not be started. If you respond with R to restart, you will return to field #1 so you can re-enter your answers to the prompts.
9. “Enter number of batch to use, (1 – 8), (E)nd:” select a batch to use then hit enter.
10. “Enter Description:” - Give the batch a name that is meaningful to you. You may call it the day of the week as well as the date. Wednesday 08/08/01 Hit enter after typing your description.

11. “Executing this program will tie up this terminal. {E}xit, {C}ontinue anyway” – Type C to continue, then hit enter. The system will start the process of creating a batch. When done, the “Order Processing Menu” will display.

Checking the Order:

```

BBITERM
02/04/04 08:52am Quick SCRIPT White's Pharmacy Rev 06.10.179 Port 17
-----
Order Processing Menu

1. (C)reate an order batch
2. (B) Create a (B)ulk order batch
3. (P)rint an order batch
4. Print an order batch (Short format)
5. (O) Place a batch 'on (O)rder'
6. (U)pdate Inv. after receiving order
7. (E)dit an order batch
8. (T)ake a batch 'off' order
9. (D)elete an order batch
10. (M) Calculate (M)in Onhand Qty
11. Drug File Maintenance
12. (Q) Clear (Q)ty on Order field
13. Scan Items Received
14. Order Batch Exception Report

20. Create Diskette Order File

30. Add items to inventory

96. MNOU Program
97. Set Internet Switch Flag
98. (X)it to MASTER menu
99. (Z) Log off this Task

88. (K)ill a Task
89. Edit RXNOTES.TXT

Enter Selection (<CR> for Main Menu ):
\\ADAPT2\CCS\0500;40013,PRN T#016 P#017 ALT-M ALT-X

```

Before placing the batch on order, you need to print and check the batch carefully to be sure the order is correct.

“#3. (P)rint an order batch” – Provides you with a report of the contents of the batch.

“Enter the number of batch to use, (1-8), (E)nd:” – type in the number of the batch you just created in the previous steps.

“Printing will tie up this terminal. (E)xit, (P)rint anyway” – type P to print then hit enter.

After printing the batch, you should carefully examine it to see if any corrections should be made. If corrections are necessary, proceed to #7 (E)dit an Order Batch to make those corrections. If there are no corrections to be made or you are through making corrections, you are ready to proceed to #5. (O) Place a batch ‘on (O)rder’ or to #20

In # 7 (E)dit an Order Batch” you will be asked to “Enter the number of batch to use, (1 – 8), (E)nd:” – type in the number of the batch you just created in the previous steps.

If the amount at line 18 is less than the amount shown at line 19, you need to order. Check the quantity at line 3 for the quantity to be ordered. If needed or desired, you may override that amount.

```

Order Batch File Maintenance
Next

1. Drug Name PREMARIN 1.25MG - 2. NDC #..... 00046086691
----- Order Information -----
3. Qty Order.. 2      8. Shelf Lab?.
4. Order Amt. $ 1618.08 9. Price Stik?
5. On Order?.. N (Y/IN) 10. Price Up?..
6. Order Date: 00/00/00 11. Cat Up?....
7. Qty Recvd.. 0      12. Re-Order Number.... 275057
13. Vendor Name..... WALSH
14. AWP Cost.....$1017.68
15. Acquisition Cost...$ 809.04
16. Unit Type..... TAB
----- Batch Information -----
17. Package Quantity.... 1000
18. Quantity on Hand.... 0
19. Minimum on hand Qty. 500
35. Description AYERST
36. Date Created. 022602 37.Total.. $ 2270.57
38. On Order? 0 (1=Y) 39.Date Ord. 00/00/00 20. Quantity on Order... 0
40. Received? N (Y/IN/P) 41.Date Rec 00/00/00 21. Minimum Order Qty... 0
----- ASAP X12 information -----
22. Current Month Sales. 1070
42. Back Ord? (Y/N)
43. PO Type (New/Prom)
----- Sales History -----
44. PO #..... 23. Jan 1600 27. May 1668 31. Sep 1222
45. PO Date.. 00/00/00 24. Feb 1384 28. Jun 2107 32. Oct 1495
46. Ship Date Qual. (R/A/B) 25. Mar 1832 29. Jul 1305 33. Nov 1700
47. Date to Ship... 00/00/00 26. Apr 1702 30. Aug 2028 34. Dec 1836

Exit, Find, Add, Change#, Delete, Next, Prev
4-Find 5-Next 6-Prev 7-Add 10-DrgFM

```

Placing the Batch on Order:

When you have your order as you want it, do one of the following steps:

1. If you are not sending your order via diskette, run "5. (O) Place a batch 'on (O)rder'.

OR

2. IF you use one of the following as your wholesalers you can run step "#20. Create Diskette Order File" which you can use on you wholesalers computer to place the order. Those wholesalers which accept the order via diskette are:

- AmeriSource
- Bergen
- Cardinal
- D and K Wholesale
- McKesson
- Smith Data
- Walsh Dohmen

```
Program creates an order file to transfer to diskette.  
Vendor codes that work are:  
  
1. (A)merisource  
2. (B)ergen  
3. (C)ardinal  
4. (D)&K Wholesale  
5. (M)cKesson  
6. (S)mith Data  
7. (W)alsh Dohmen  
  
(E)xit or enter Vendor code: _
```

When running step #20, you will be asked to enter the Vendor code. Select your vendor either by number or by the letter enclosed by the left and right parenthesis.

Ex: Type 1 or A if selecting Amerisource

“Enter number of batch to use, (1-8), (E)nd:” – type in the number of the batch you’ve just created in the previous steps.

Answer the remaining questions appropriately.

When completed, you may remove the diskette from the CECS computer, insert it into your wholesalers’ computer, and upload the order. If you have questions or problems regarding uploading your order, please contact your wholesaler.

When you receive your order from the wholesaler:

1. To check in your order, go to the Pharmacy Main Menu.
2. Enter 5 or O for Order Processing to enter the sub-menu for processing an order.

```
BBITERM
02/04/04 08:52am Quick$CRIP White's Pharmacy Rev 06.10.179 Port 17
-----
Order Processing Menu
1. (C)reate an order batch
2. (B) Create a (B)ulk order batch
3. (P)rint an order batch
4. Print an order batch (Short format)
5. (O) Place a batch 'on (O)rder'
6. (U)pdate Inv. after receiving order
7. (E)dit an order batch
8. (T)ake a batch 'off' order
9. (D)elete an order batch
10. (M) Calculate (M)in Onhand Qty
11. Drug File Maintenance
12. (Q) Clear (Q)ty on Order field
13. Scan Items Received
14. Order Batch Exception Report
20. Create Diskette Order File
30. Add items to inventory
96. MNOU Program
97. Set Internet Switch Flag
98. (X)it to MASTER menu
99. (Z) Log off this Task
88. (K)ill a Task
89. Edit RXNOTES.TXT
Enter Selection (<CR> for Main Menu ):
\\ADAPT2\CCS\0500:40013,PRN T#016 P#017 ALT-M ALT-X
```

3. Two methods are available for updating your order.

Review the order by comparing the packing slip with the order batch using “#7 (E)dit an order batch”.

If the item was not received, change field 7 (Qty Rcvd) to 0.

Run “#6 (U)pdate Inv. after receiving order.

OR

IF you use a bar code reader, instead of checking in your order using the above method, you may check it in as follows:

Enter “#13 Scan Items Received”

“Enter number of batch to use, (1 – 8), (E)nd:” – type in the number of the batch used for the order received.

“Clear Qty Received field? (Y/N)” – respond with Y and hit enter.

“Exit or Enter NDC# of item” – Scan the barcode of the item you wish to check in as received.

Run “#6 (U)pdate Inv. after receiving order”

NOTE!! You can exclude certain drugs from auto orders by using code line number 29 in the Drug File Maintenance screen.

Other Available Options on the Order Processing Screen:

2. (B) Create a (B)ulk order batch. – Same as “#1, Create an order batch” with the exception that the quantity on hand is ignored.
4. Print an order batch. (Short Format) – Instead of printing the details of the order, this routine will print the name of each drug ordered in the selected batch and the quantity ordered for each drug. It will also print the total number of items ordered.
8. (T)ake a batch ‘off’ order. – Exactly that. If you put a batch on order in error, this function removes the batch from being on order.
9. (D)eleate an order batch. – Allows you to delete an order batch setting it back to an empty status as if you had never used it. When asked if you wish to delete the batch, the answer of “yes” or “no” must be spelled out completely. Do not answer with Y or N then enter as the computer will exit the routine as if nothing was done.
10. (M) Calculate (M)in Onhand Qty. – If you do not have your minimum on-hand quantities in your drug file, the computer can calculate them for you. This calculation, however, will not be as accurate an amount as you would put in yourself.
11. Drug File Maintenance – Allows you into the drug file to add, change or delete drugs and/or their information. This is the same function located in the Processing Menu and the Utilities Menu.
12. (Q) Clear (Q)ty on Order field. – Clears the quantity on order field (# 39) for each drug in the drug file.
14. Order Batch Exception Report – Prints those items which were not received.
30. Add items to inventory – Allows you to quickly increase the amount of inventory for one drug at a time. Increases the inventory by adding the package quantity one time to the on-hand quantity.

NOTE: Once a batch has been edited for drugs not received, and the batch has been “received” using step 6, the drugs that were not received are not retrieved in the batch. A new batch must be created and those drugs will be placed on order again.