Tennessee Department of Health
Receipt, Stage, Store (RSS)
Warehouse Taskforce

TNCRN Inventory Management Step-By-Step Instructions & Quick Guides

Updated 8-29-12

Tennessee Department of Health - Strategic National Stockpile
Receipt, Stage, Store (RSS) Warehouse :: Job Action Sheet

Inventory Control Lead

Assigned location	Receipt, Stage, Store (RSS) Warehouse
Functional area	Logistics
Reports to	RSS Logistics Section Chief
Supervises	Inventory Control support staff
Job description	Provide tracking of all assets into and out of the RSS Warehouse.
Equipment Needed	Kenwood Radio, Laptop with access to TNCRN Inventory Management, Printers

Beginning of Shift Duties	❑ Sign-in/Check-in with Logistics Section Chief at RSS Warehouse ❑ Ensure proper RSS identification ❑ Receive briefing and ensure knowledge of incident ❑ Review SNS Plan and job action sheets ❑ Determine staffing needs (schedule/shifts) and acquire appropriate staff resources ❑ Provide briefing to Logistics Section Chief ❑ Provide Just-In-Time Training to Inventory Control staff
Job Duties	❑ Identify and report safety issues ❑ Acquire equipment and supplies required for inventory control function ❑ Receive RSS inventory information and initialize the information in the inventory management system ❑ Supervise tracking of inventory as it is received and shipped ❑ Ensure that documentation is maintained for RSS inventory control activities ❑ Supervise checking of stock level and ordering/requesting of additional SNS products as needed or directed ❑ Supervise support staff ❑ Make decisions and solve problems in the absence of or as directed by the RSS Logistics Section Chief ❑ Keep RSS Logistics Section Chief informed of developments, progress, and problems
End of Shift Duties	❑ Brief incoming Inventory Control Lead ❑ Sign-out/Check-out with SHOC Logistics Section Chief ❑ Return any RSS equipment and radios ❑ Participate in After Action Review or Hotwash, as needed

State of TN - RSS Warehouse Workflow update 10-28-13

Indicates item to be done in the TNCRN Inventory Management software

Receiving

- Receive shipment from CDC or vendor
- Unload trucks, stage product, verify quantities against incoming packing list. Copy of packing list to Inventory Control
- Assign products to warehouse location and move products to that location
- **Enter received quantities and locations into Inventory Management (IM) via handhelds in STOCK ADJUSTMENT**
- Receiving Unit notifies Inventory Control that quantities and locations have been entered.

Inventory Control

- **Verify items are in Inventory Management (IM) from incoming packing lists. Enter new items in ITEM MASTER - *without quantity* -**
- RSS DACO notifies the SHOC product is ready and available. Receive orders from the SHOC
- **Print Location Labels for Receiving and Carton Labels for Picking through PRINT-LABELS**
- **Input orders & drop orders to create pick tickets through ORDER ENTER, ORDER MANAGER**
- Notify Picking Unit that orders are ready to be picked
- When orders are picked, Create Chain of Custody and Bill of Lading forms and send to Distribution

Picking

- Picking Unit picks orders. RECOMMENDATION: Load only one order per carton per ship-to site (or multiple cartons). DO NOT MIX ORDERS. Stay within 4'x4'x4'
- Attach (1) Carton Label to the pick ticket and (1) Carton Label to the pallet or shipment. MAKE SURE THEY ARE THE SAME NUMBER.
- **Picking Unit Lead picks the orders in the Inventory Management (IM) to create packing lists via handhelds through STANDARD PICK**
- Make sure packing lists printed at Inventory Control and sent to Quality Assurance
- Deliver completed labeled cartons, pick tickets and packing lists to Quality Assurance Unit

Quality Assurance

- Review cartons for accuracy against pick tickets and packing slips. Make corrections as necessary
- Resolve any discrepancies with Inventory Control
- **Through SHIP TO DOCK, mark the order as "Shipped" in Inventory Management (IM) to finalize the order.**
- Attach packing lists, shipping information, then wrap pallets
- Deliver finalized pallets to Distribution

Distribution

- Plan delivery method and route from copy of order. Plan truck loading scheme First In, Last Out (FILO).
- Coordinate truck size and type, drivers, security escorts.
- Receive completed orders from Quality Assurance, verify shipments are properly wrapped and identified.
- Load pallets onto trucks. Give driver routing information, Bill of Lading and/or Chain of Custody forms
- Notify Inventory Control of shipped items, estimated time of arrival, driver's name, security escort name.
- RSS DACO notifies the SHOC of shipments with estimated delivery times, driver ID, security ID

State Health Operations Center (SHOC)

- Requests supplies. Coordinates arrival at the RSS Warehouse. Activates RSS & Warehouse Taskforce.
- Requests trucks with security escorts.
- Coordinates which sites are open, determines allocations.
- **Inputs orders into TNCRN, if internet connectivity possible between all locations.**
- Gets copy of packing slip from RSS DACO.
- Notifies the end point of shipments with estimated delivery times, driver ID, security ID

State of TN - RSS Warehouse Paperwork Flow update 10-28-13

KEY
Copy 1 = where document originates

Incoming non-IM Document
Inventory Management (IM) System Document
Other non-IM Document

ALL PAPERWORK GOES TO INVENTORY CONTOL AFTER FUNCTION IS COMPLETE.

Receiving

Incoming Packing Slip 1 of 3
Incoming Chain of Custody (if needed) 1 of 1
Incoming Bill of Lading (if needed) 1 of 1

Inventory Control

Incoming Packing Slip 2 of 3
Inventory List 1 of 2
Order 2 of 3
Pick Ticket 1 of 3
Packing List 1 of 3
Bill of Lading (if needed) 1 of 2
Chain of Custody from Packing Lists 1 of 6

Picking

Carton Label 1&2 of 2
Pick Ticket 2 of 3

Quality Assurance

Pick Ticket 3 of 3
Packing List 2 of 3
Packing Labels 2 per carton/pallet

Distribution

Order 3 of 3
Packing List 3 of 3
Bill of Lading (if needed) 2 of 2
Chain of Custody from Packing Lists copies 2 to 6
Routing Times & Directions 1 of 2
Truck Size & Type, Driver, Security Escort 1 of 2

State Health Operations Center (SHOC)

Incoming Packing Slip 3 of 3
Inventory List 2 of 2
Order 1 of 3
Routing Times 2 of 2
Truck Size & Type, Driver, Security Escort 2 of 2

TNCRN Inventory Management :: Step By Step Instructions

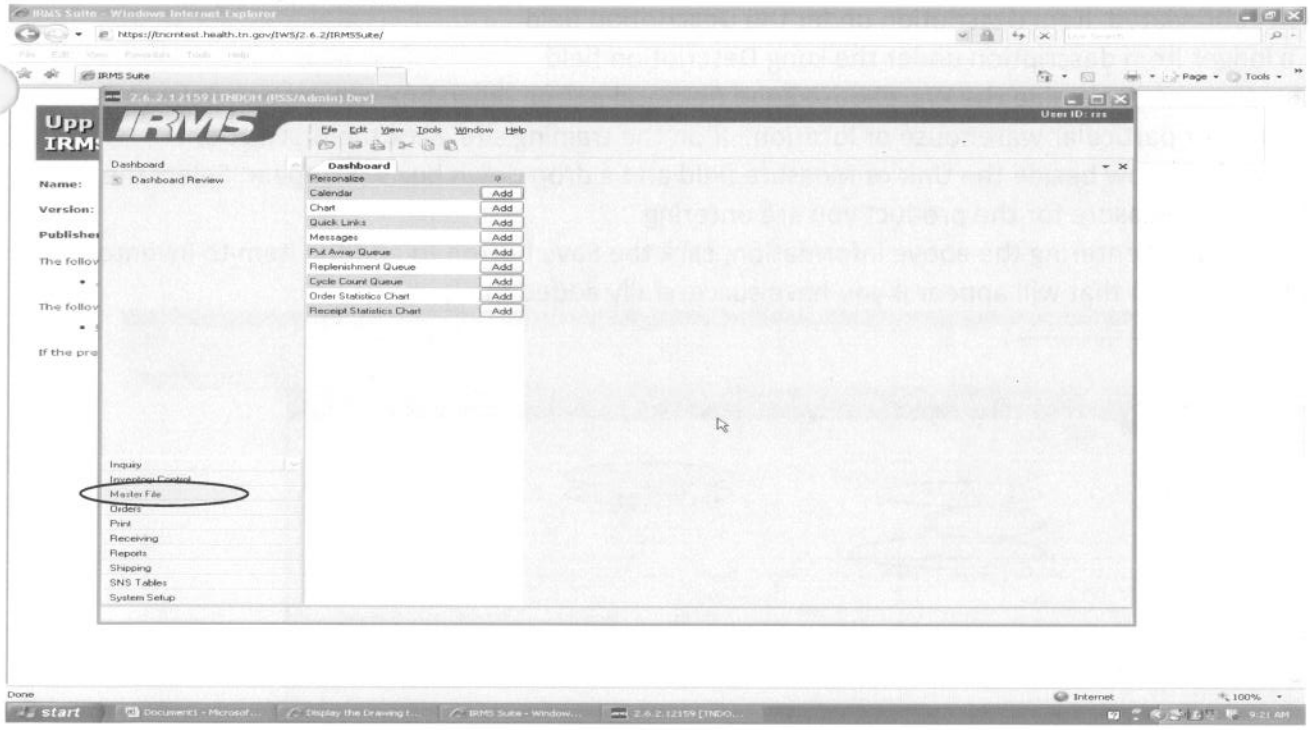
This printed document explains the steps to set up and item and place an order in the TNCRN Inventory Management System. Covered topics are:

- Step 1 - Item Set-up
- Step 2 - Stock Adjustment
- Step 3 - Order Entry
- Step 4 - Order Manager
- Step 5 - Order Picking

Detailed tutorials are also available and located at: http://health.state.tn.us/TEMARR/InvMgt.shtml

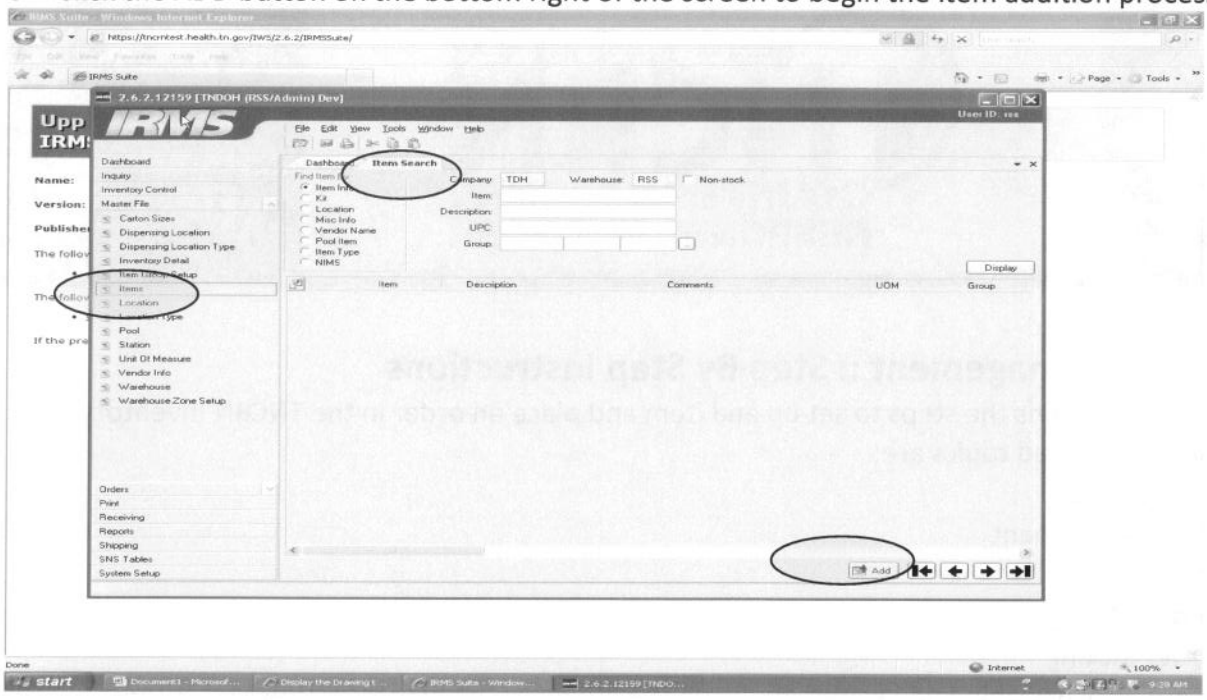
STEP 1 – Item Set-Up

1. Click on Master File tab

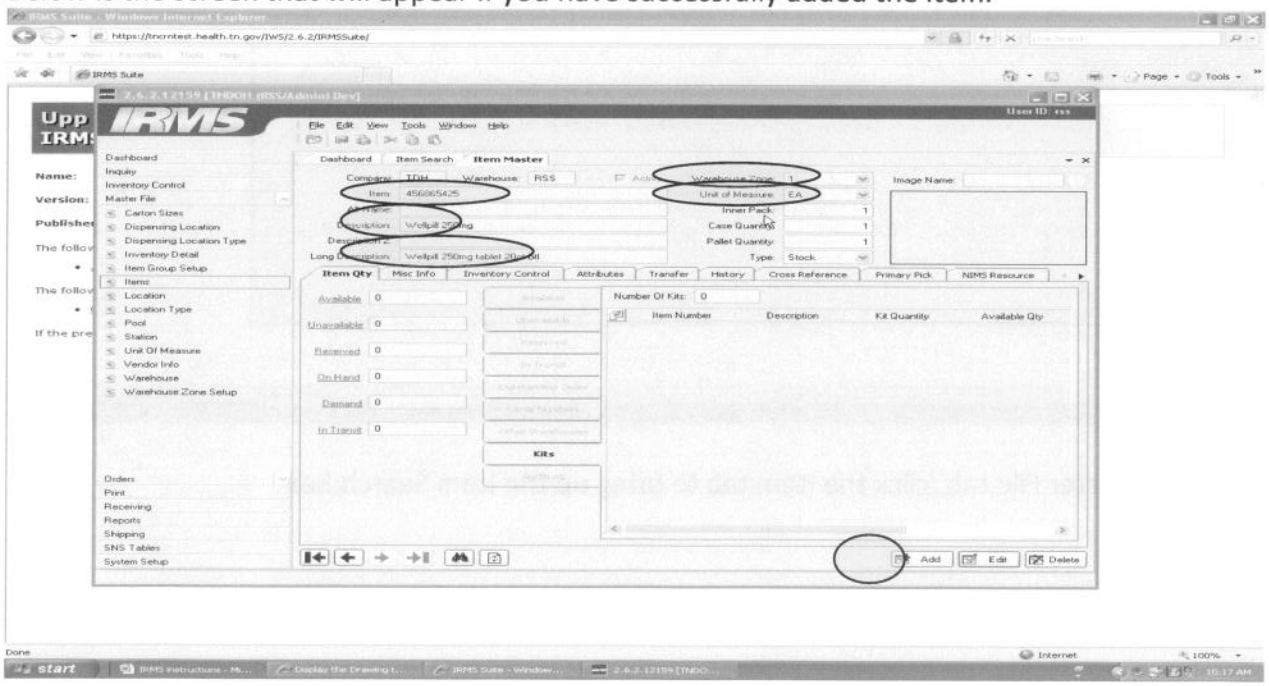


2. Under the Master File tab, click the Item tab to bring up the Item Search Box

3. Click the ADD button on the bottom right of the screen to begin the item addition process.



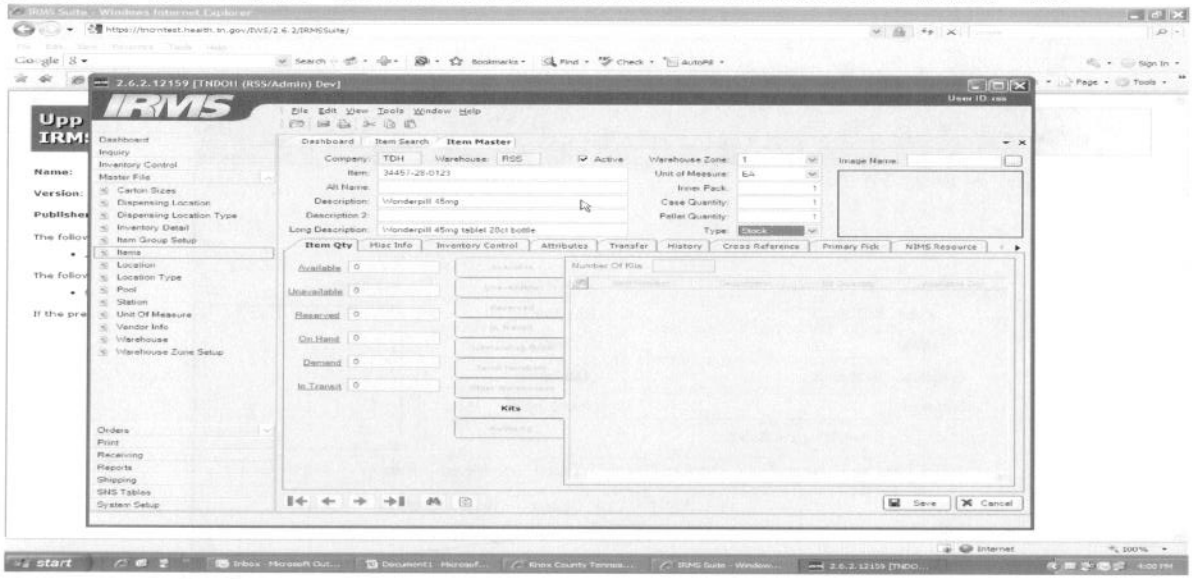
4. Enter the Item Number. You can use the NDC (pharmaceuticals) or manufacturer code (non-pharmaceuticals).
5. Enter an abbreviated Item description under the Description field
6. Enter a longer Item description under the Long Description field
7. Click the down arrow beside the Warehouse Zone field and a drop down box will appear. Select the option for your particular warehouse or location. If on the training site, click the first option
8. Click the down arrow beside the Unit of Measure field and a drop down box will appear. Select the desired unit of measure for the product you are entering
9. If you are finished entering the above information, click the Save button to add the item to inventory.
10. Below is the screen that will appear if you have successfully added the item.



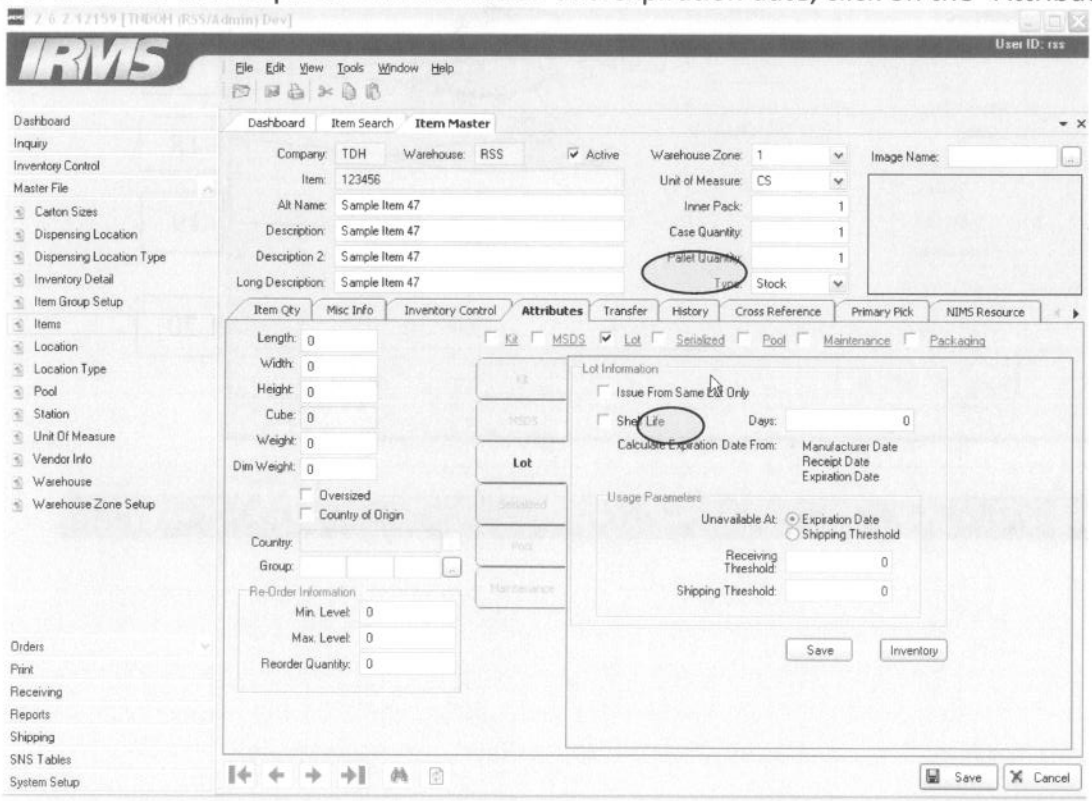
11. To add the next item, you may click the ADD button in the lower right hand corner and repeat the process above.

If your item has a lot number and expiration date- you MUST do the following before adding the amount of inventory for the item. Once you add inventory to an item, you cannot go back and make it lot controlled.

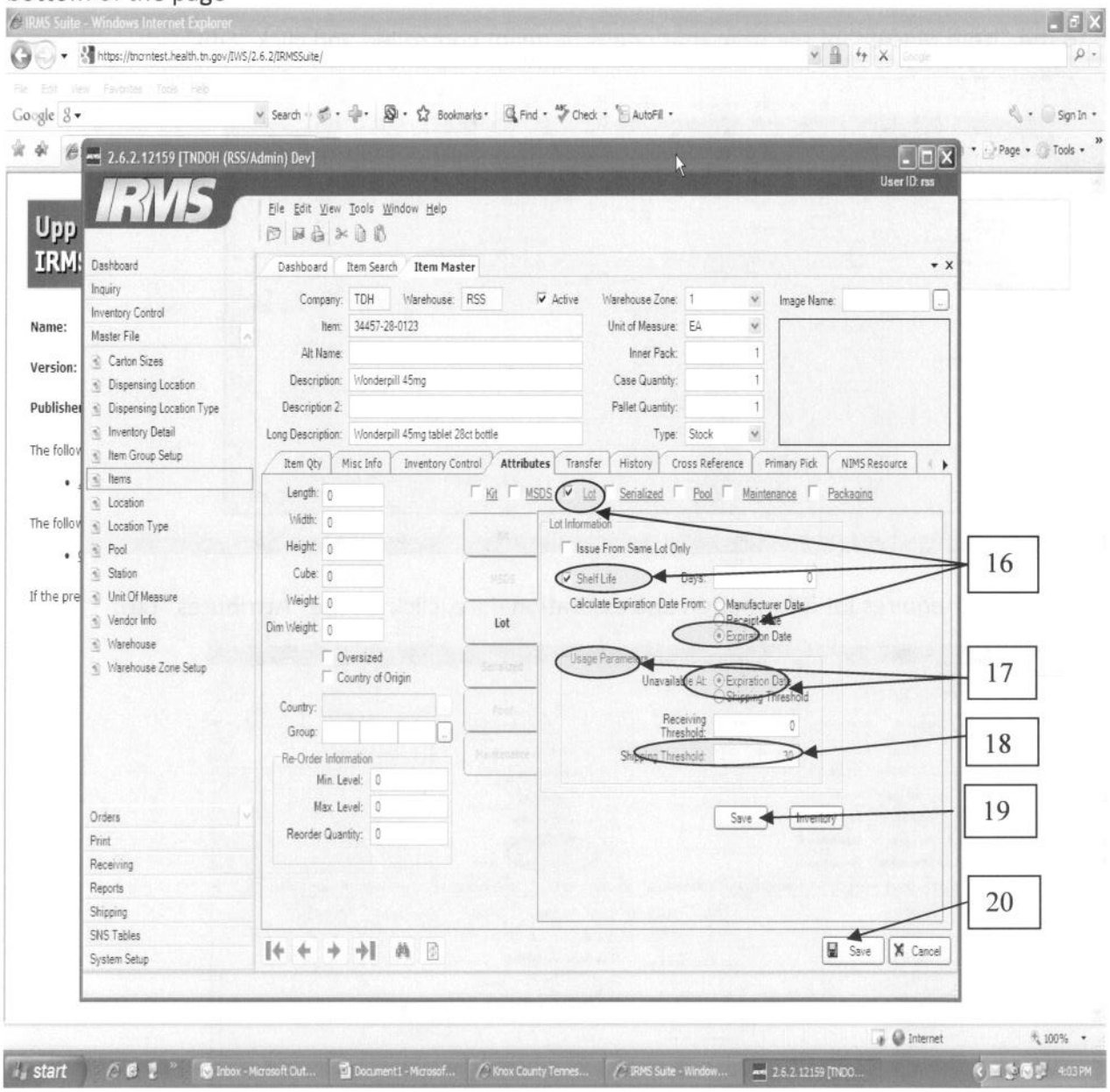
12. Go to the "Item Master" of the item that needs to be lot controlled and click "Edit"



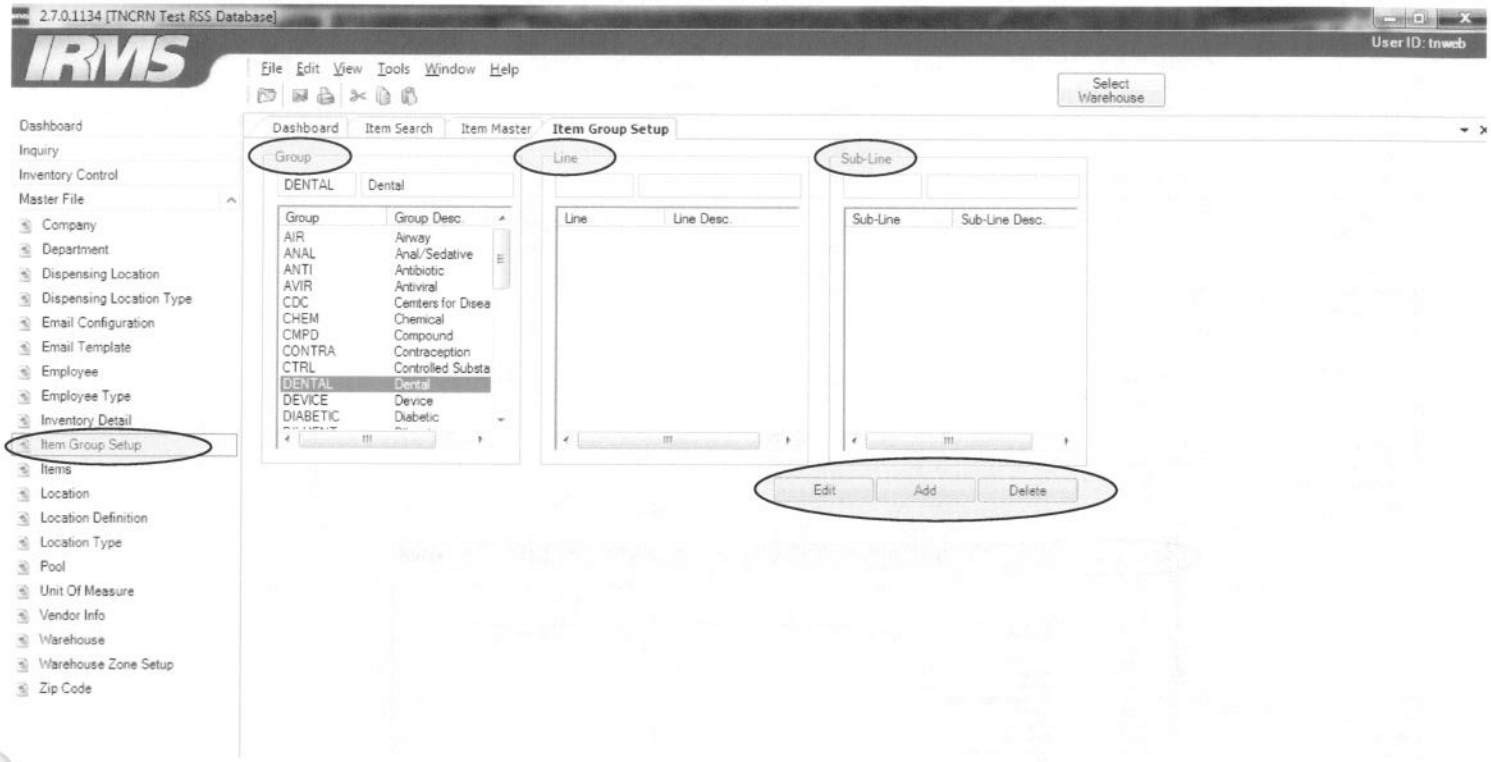
13. For the Item that requires lot information and expiration date, click on the "Attributes" tab.



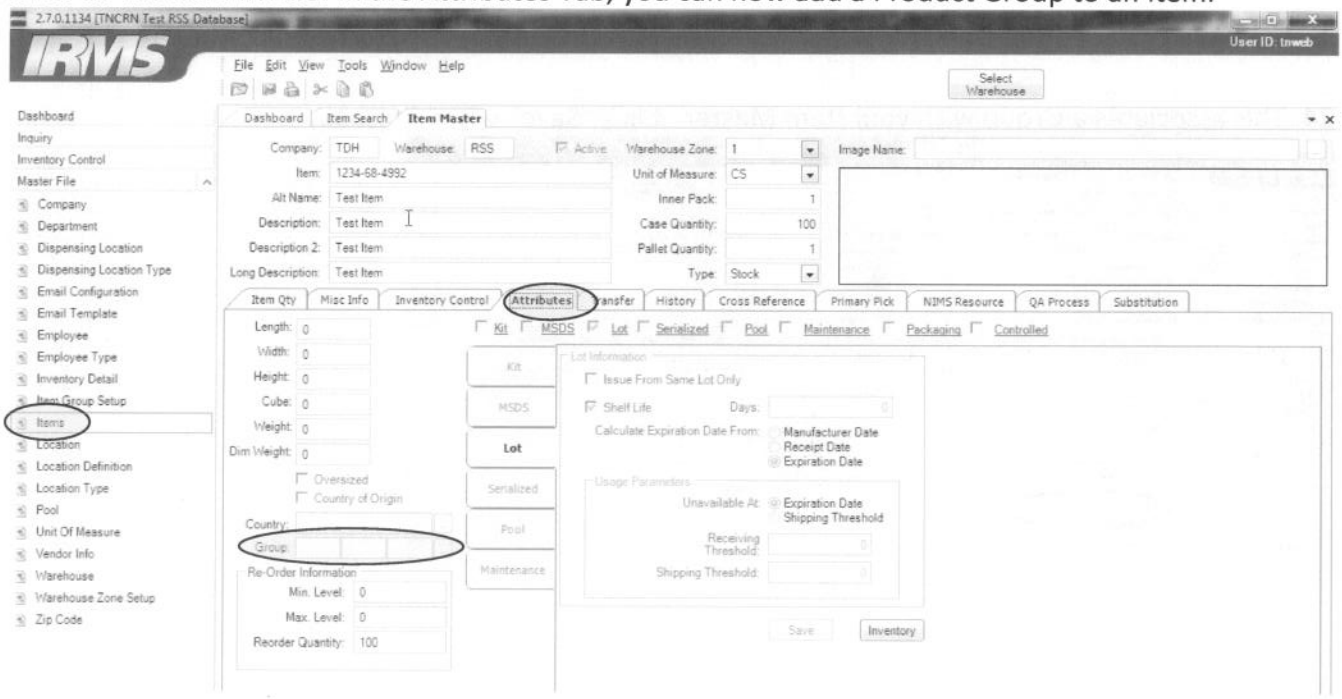
14. The following screen will appear. You will need to check the box for "Lot." When you do this the box for "Lot Information" will become available. In the "Lot information" box check "Shelf Life" then "Expiration Date."
15. Next, under "Usage Parameters" check "Unavailable at" button next to "Expiration date."
16. Next to the "Shipping Threshold" place the number 30. This field tells the system not to ship this products without manager override if the expiration date is less than 30 days.
17. Press the "Save" button in the "Lot Information" panel
18. Press the "Save" button for the "Attributes" tab AND press the "Save" button for the Item Master at the bottom of the page



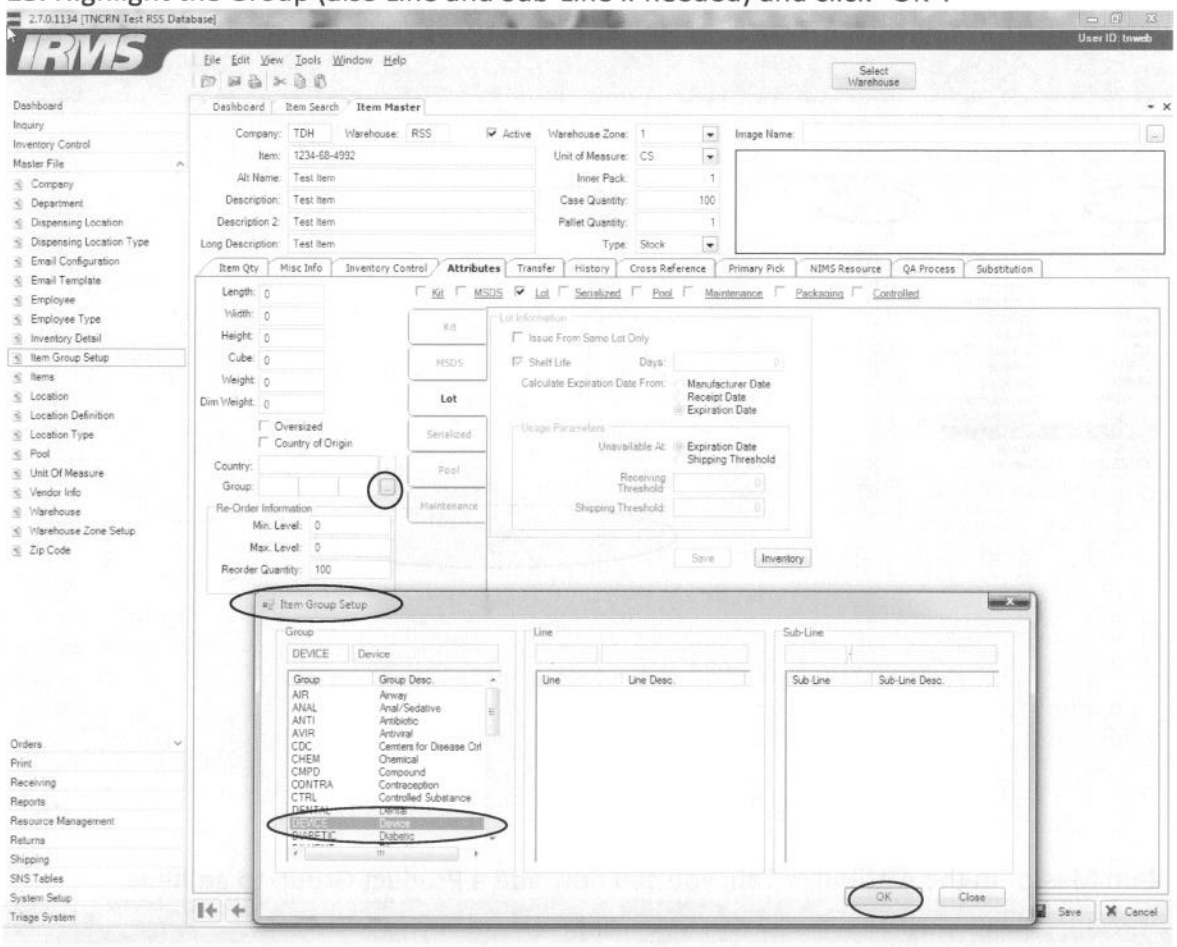
19. Also in the Attributes tab, it is a good idea to associate a Product Group for sorting or grouping similar items. The Item Group Setup screen will allow you to define the Group, Line, and Sub-Line giving you three levels of sorting/filtering capability. Use the Edit, Add, Delete buttons to set up your Groups.



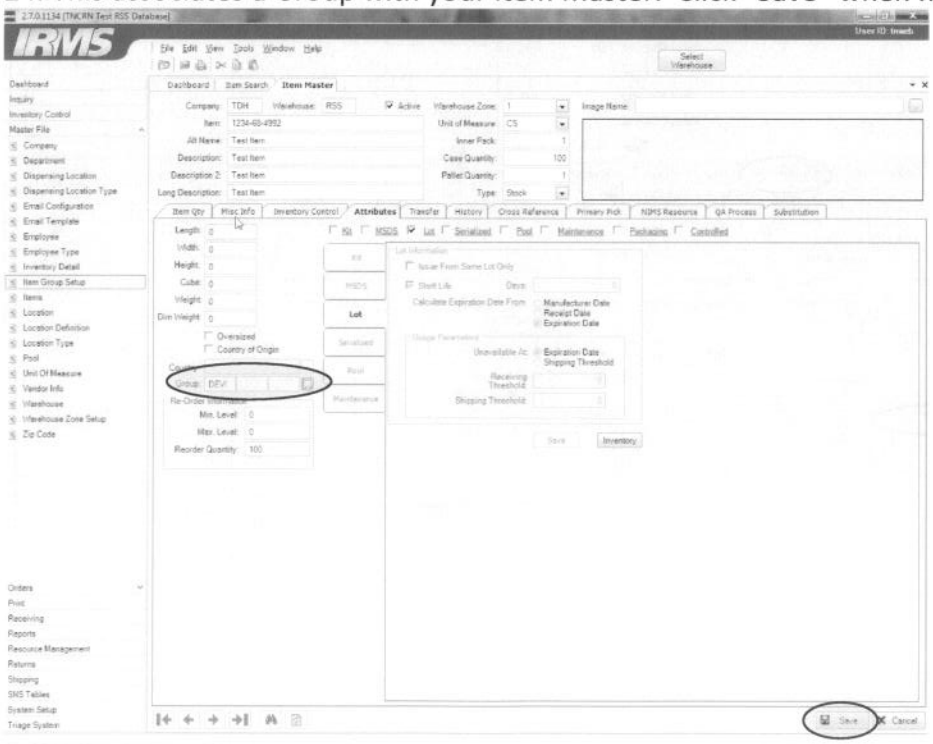
20. Back on the Item Master in the Attributes Tab, you can now add a Product Group to an Item.



21. Click "Edit" at the bottom of the screen.
22. Click the ellipsis (...) to select the Group you wish to associate to this Item. The Item Group Setup window will appear.
23. Highlight the Group (also Line and Sub-Line if needed) and click "OK".



24. This associates a Group with your Item Master. Click "Save" when finished.



STEP 2 – Stock Adjustment

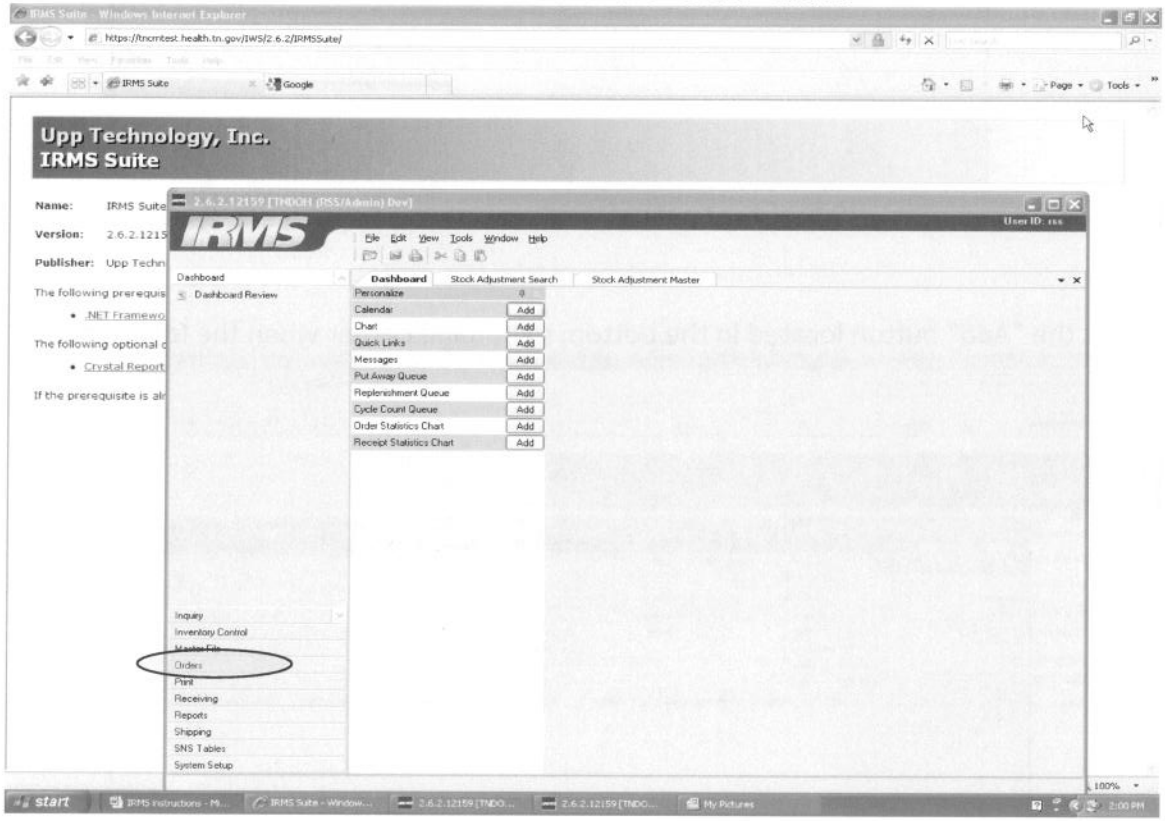
Stock Adjustment can be done on the client (desktop version of the software) or the RF (handhelds). Detailed Quick Guides for either method are embedded below. These documents are also available on the TEMARR website: http://health.state.tn.us/TEMARR/InvMgt.shtml

Quick Guide Stock Adjustment.pdf

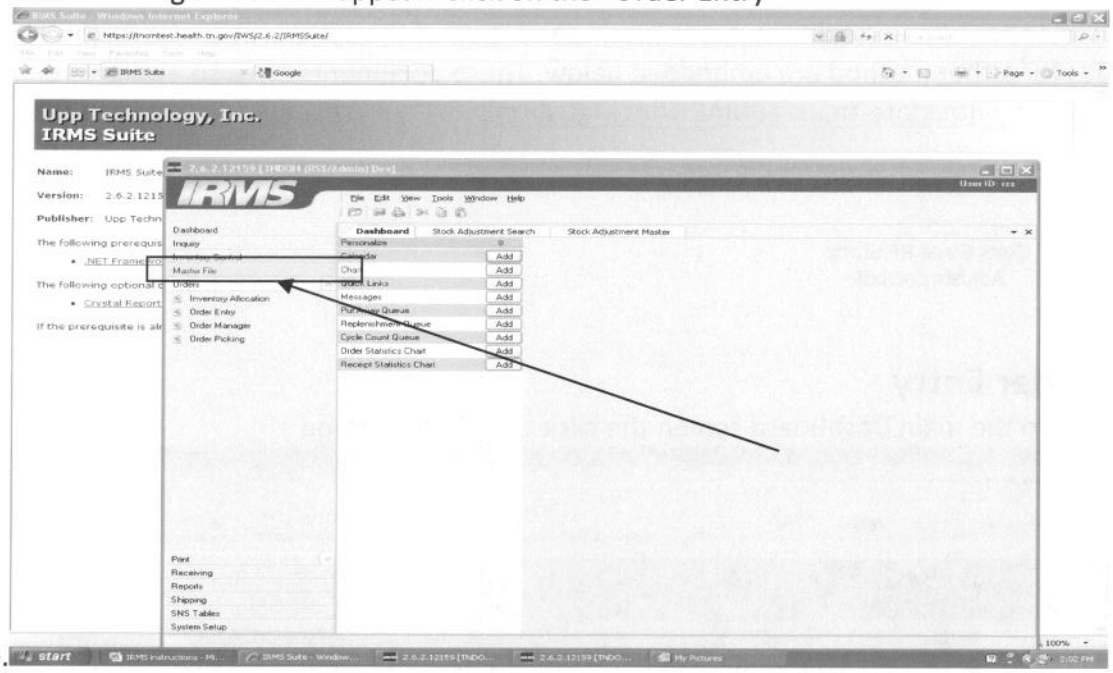
Quick Guide RF Stock Adjustment.pdf

STEP 3- Order Entry

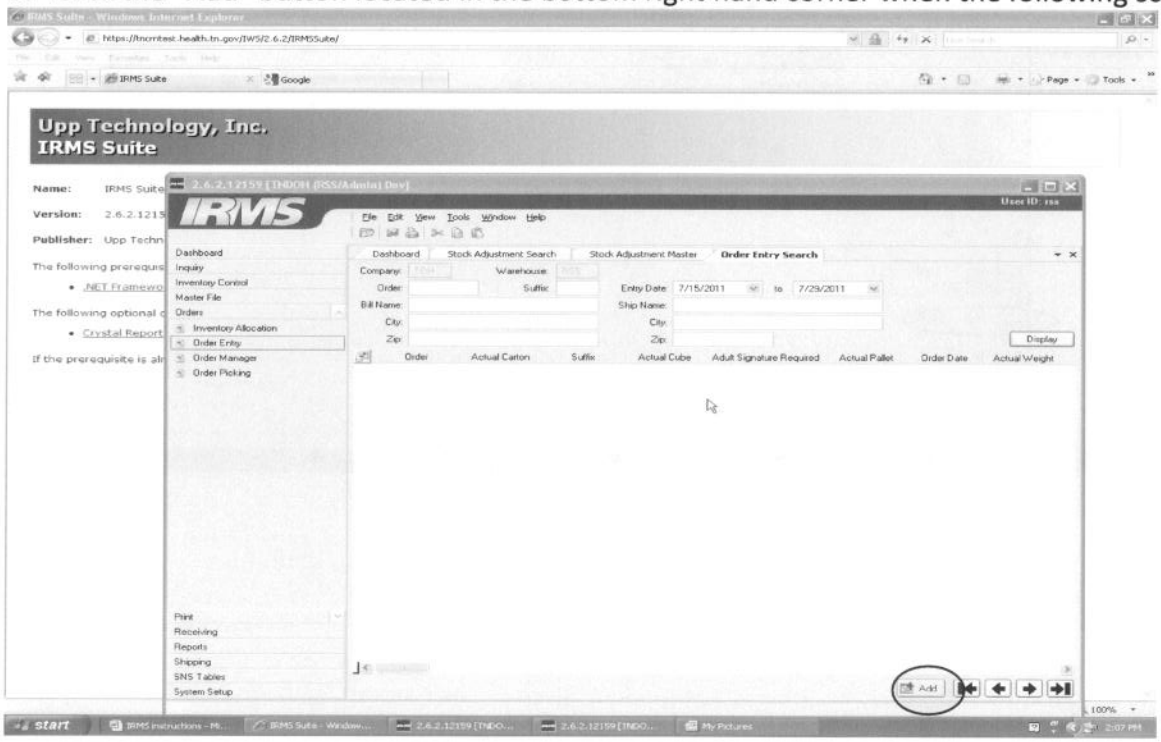
1. Go to the main Dashboard screen the click the "Order" menu



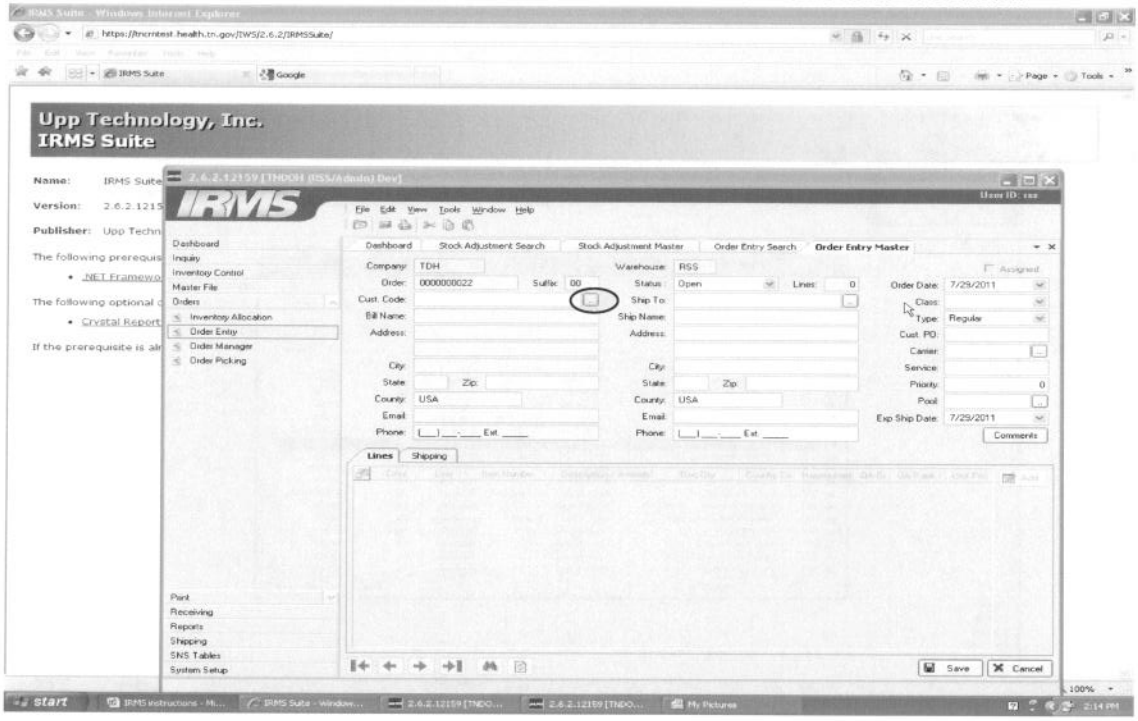
2. The following screen will appear. Click on the "Order Entry" tab.



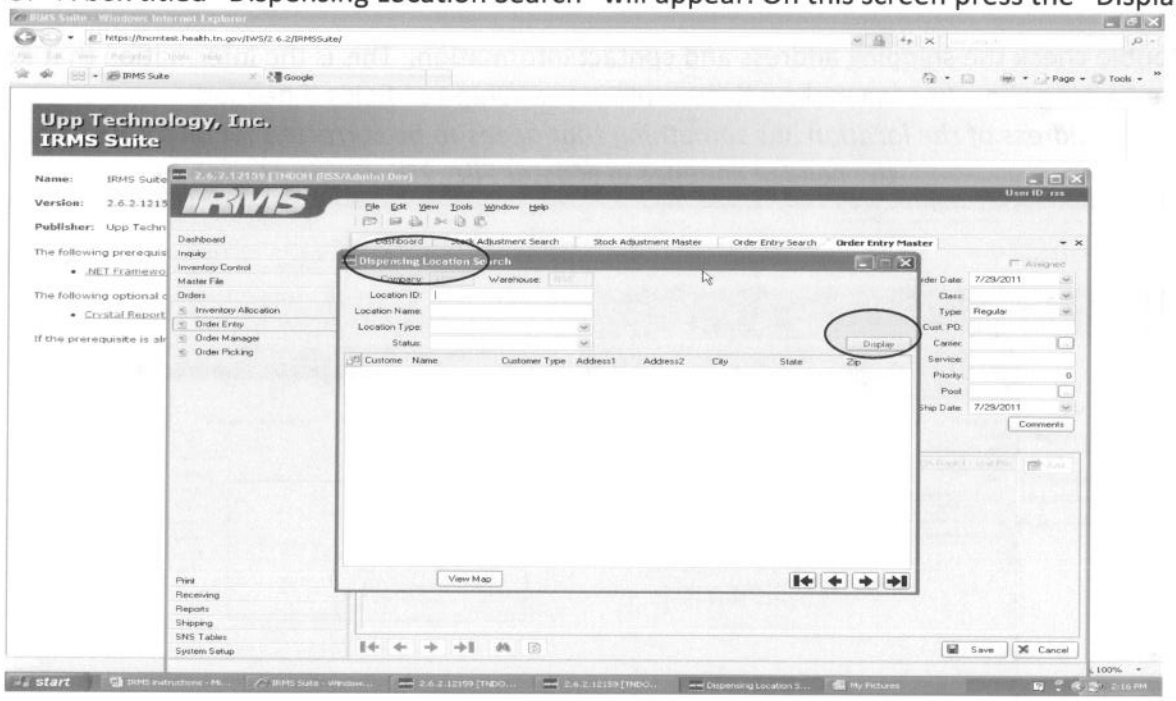
3. Click the "Add" button located in the bottom right hand corner when the following screen appears



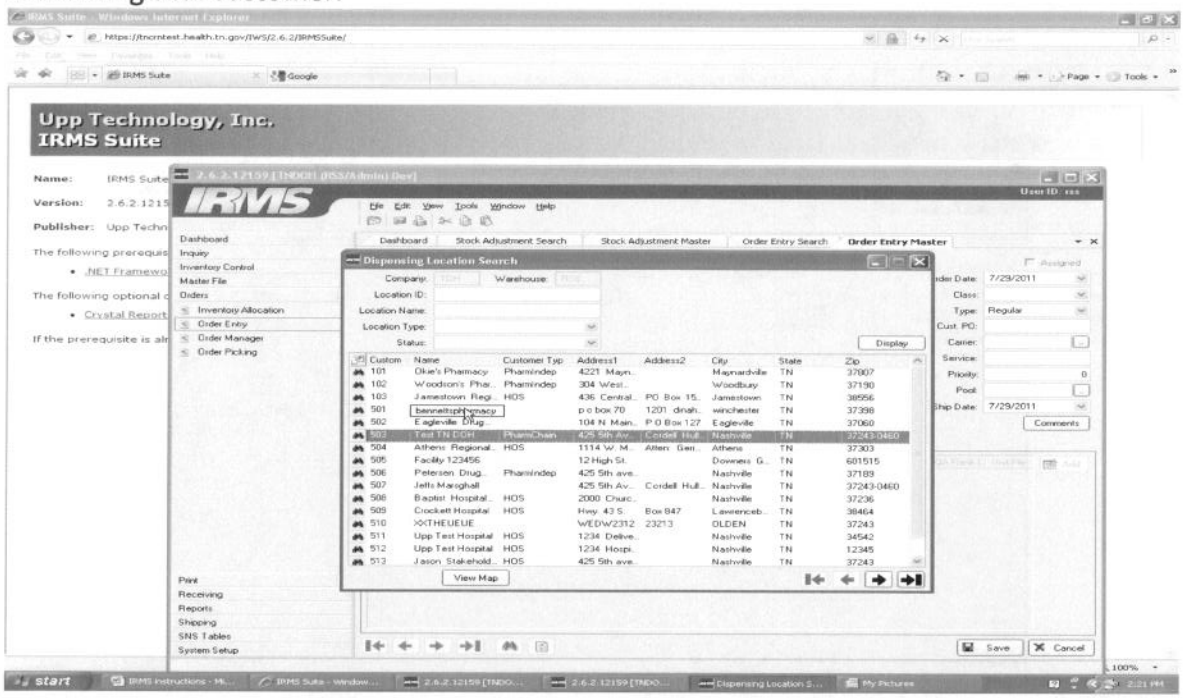
4. You will first need to select who the order is being built for. This is accomplished using the "Cust Code:" field. Double click on the box with 2 dots in it which is next to this field.



5. A box titled "Dispensing Location Search" will appear. On this screen press the "Display" button.



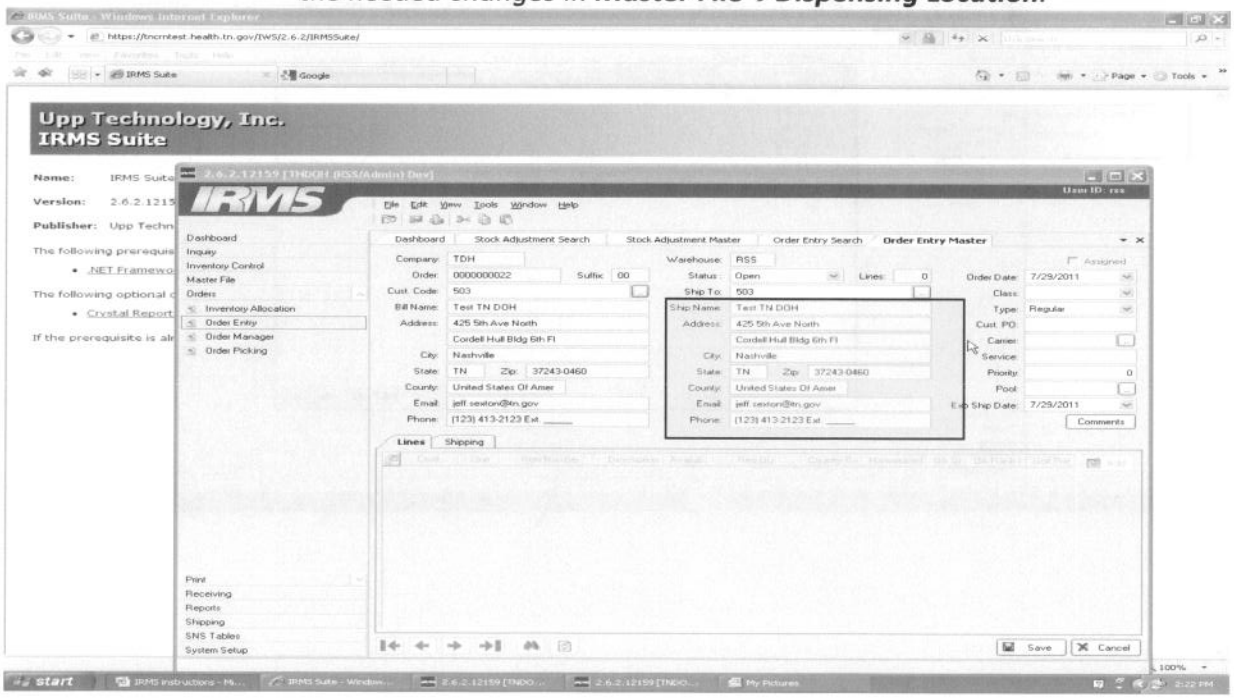
6. A list of possible customers will appear. Locate the desired customer and double click the line containing that customer.



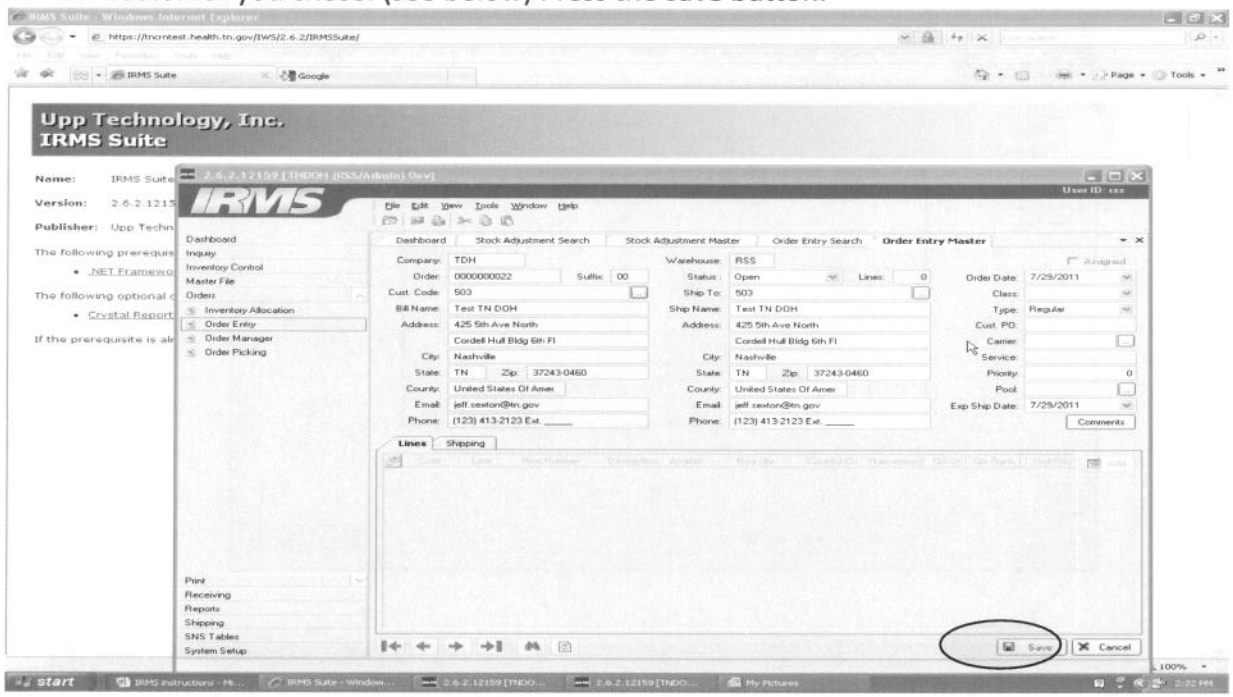
NOTE: You can also filter the choices multiple ways like typing part of the name in the "Location Name" field or filtering by "Location Type".

Double check the shipping address and contact information. This is the information that appears on the Packing Slip. You can make adjustments in the "Ship To" fields if needed.

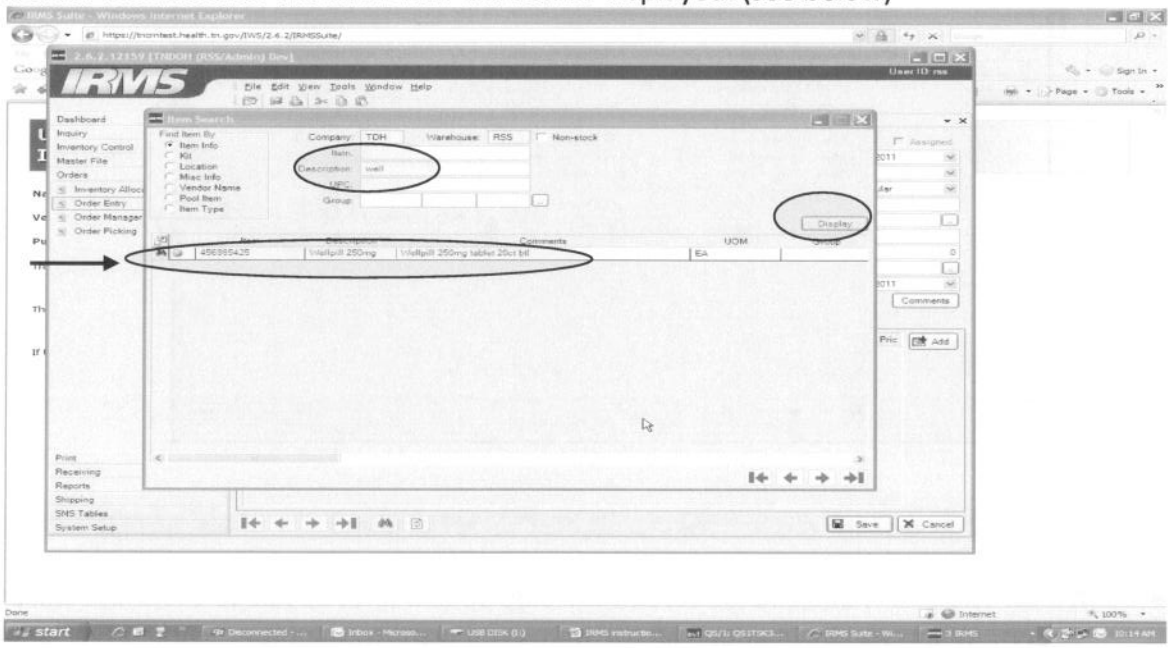
If the address of the location has something that needs to be corrected for all future shipments, make the needed changes in ***Master File →Dispensing Location****.*



7. The "Order Master Entry" tab will appear and populate with all customer information on file for the customer you chose. (see below) Press the save button.

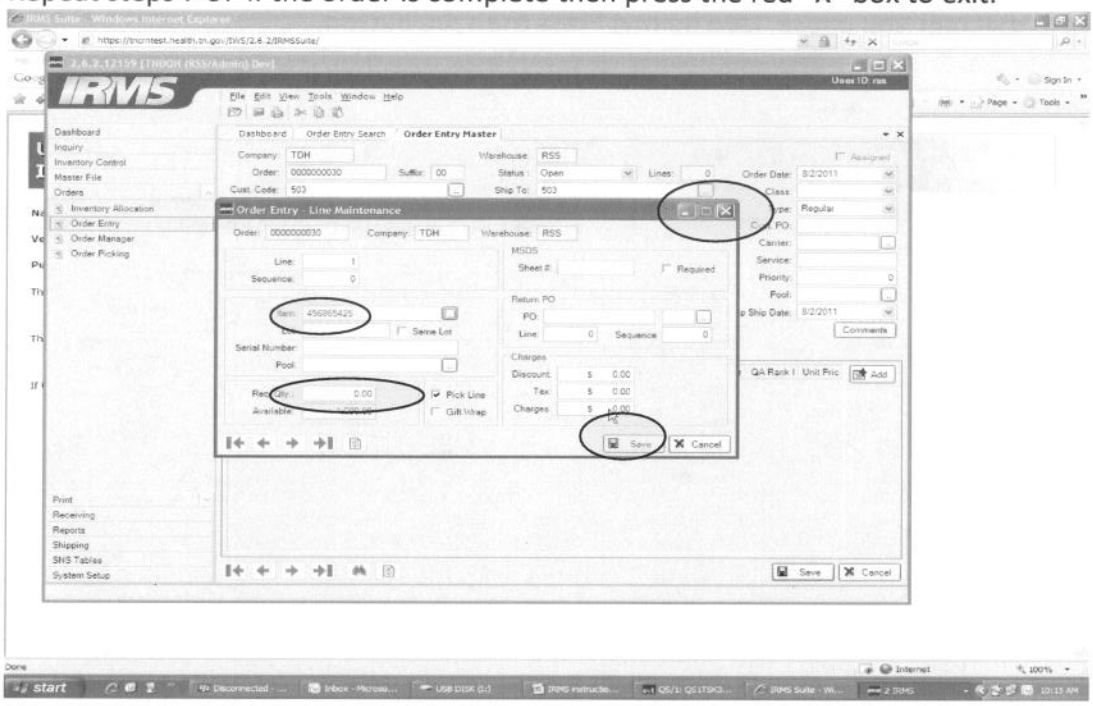


8. The "Item Search" screen will appear next. Next to the "Description" field, type the first 3 – 4 characters of the desired item and click the "Display" button. Your desired item should appear below. Double click the line when the item is displayed. (see below)

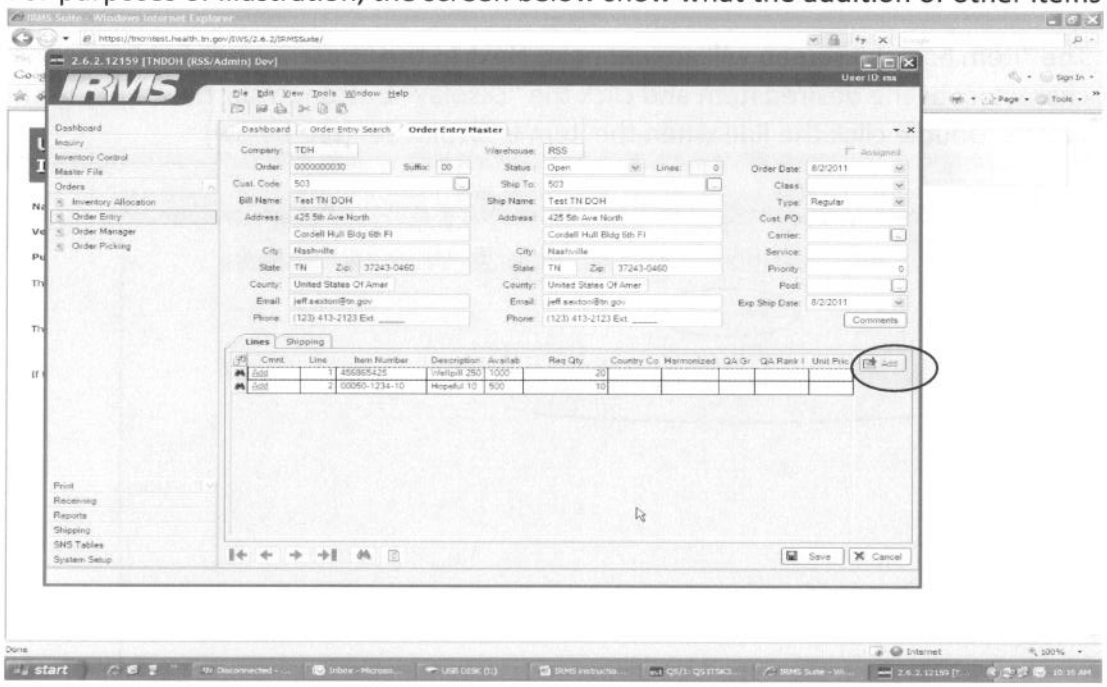


9. After you select your item, the following screen will appear. Note that only the item number is displayed. In the space next to the "Req. Qty" field, enter the desired number of product units of this item for this order. Note that the total amount of stock for this item in this warehouse location are displayed directly below this the "Req. Qty" field in the space next to "Available". Press the "Save" button when you are finished and ready to move to the next item on the order.

10. Repeat steps 7-9. If the order is complete then press the red "X" box to exit.



11. For purposes of illustration, the screen below show what the addition of other items will look like.

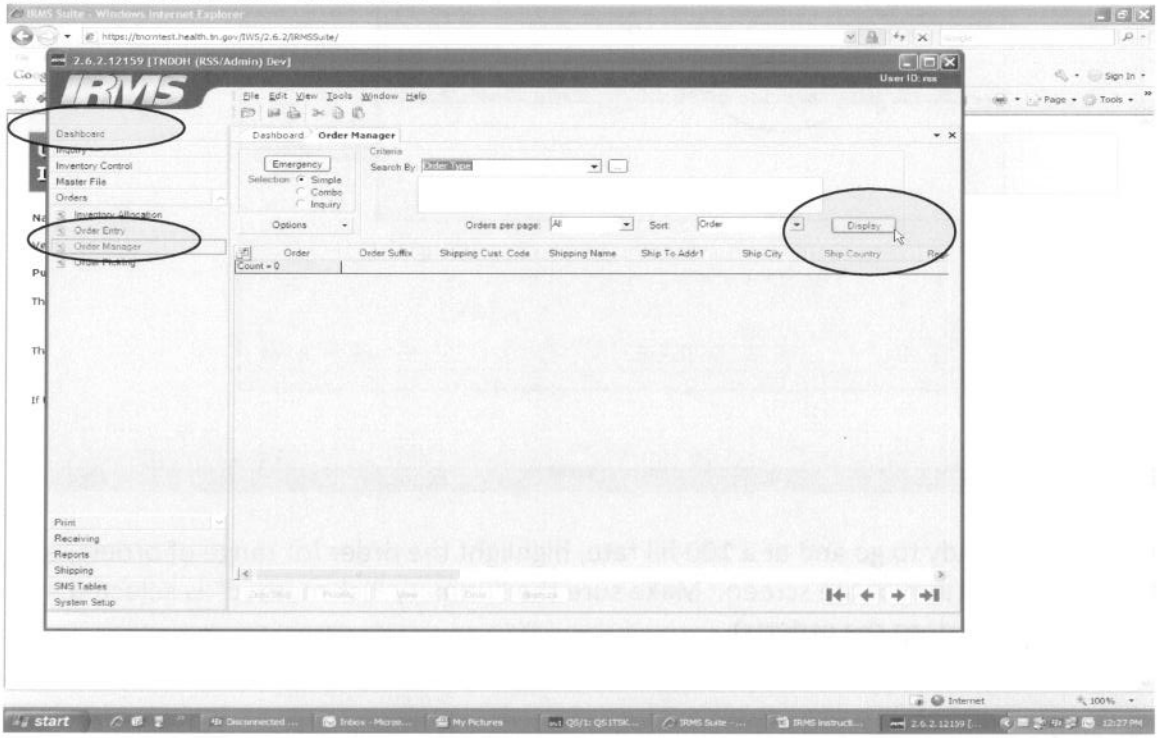


NOTE: The Line Maintenance Screen will stay up and lines added to the order will be behind that screen. When you have added all the items you want to the order, click "Save" and then "Cancel". If you need to add additional lines after you have gotten out of the "Line Maintenance Screen", click "Add" on the right side halfway down the screen. (see picture for #11).

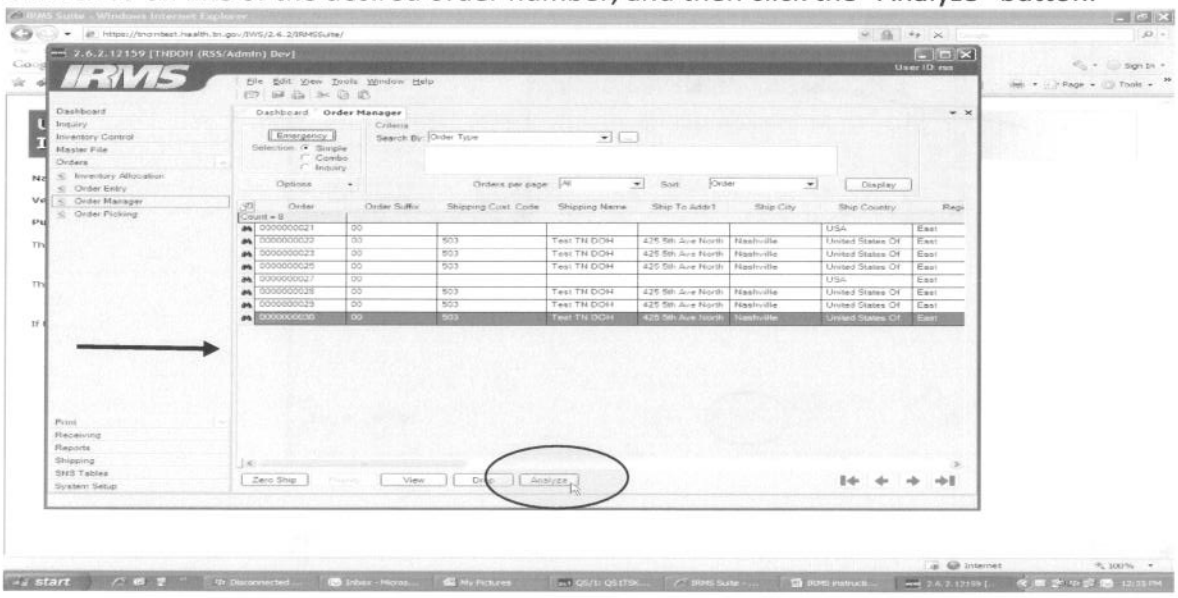
Step 4 – Order Manager

Once you have built the order, you need to check to make sure you have enough stock in the warehouse to fulfill the order and then you will need to Drop the order. This is done under the Order Manager screen.

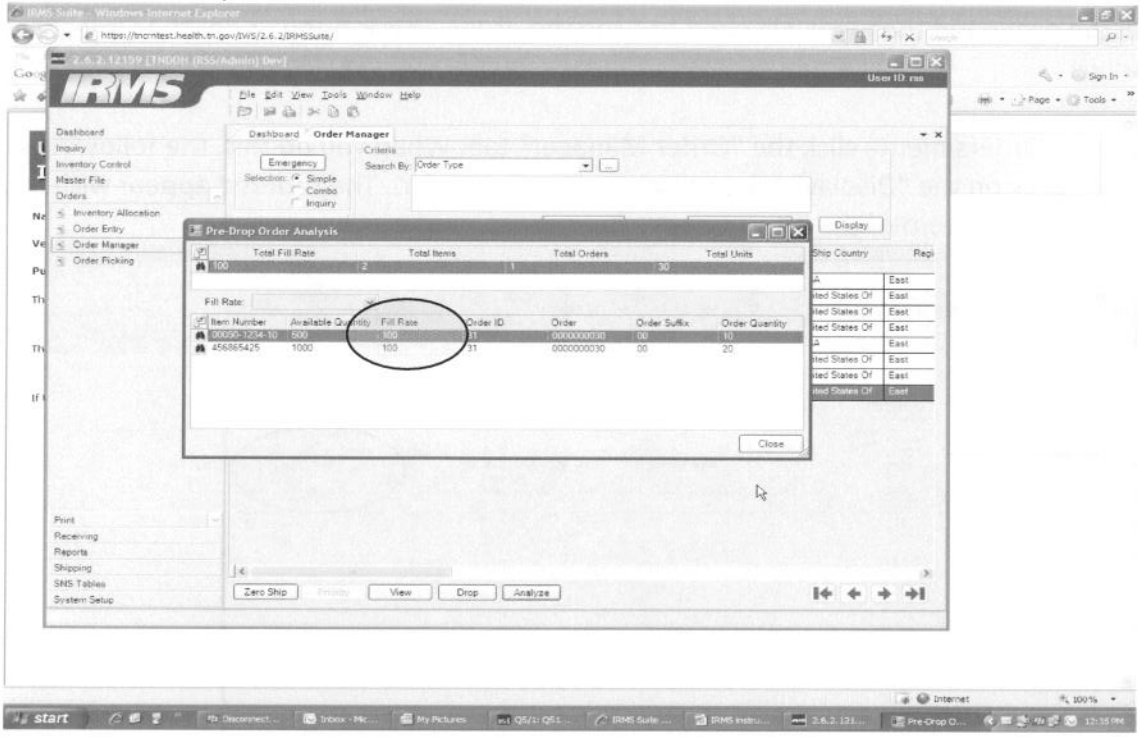
1. Under the Orders menu, click the "Order Manager" tab. When you do this, the following screen will appear. Click on the "Display" tab to display all orders so far. The ordered appear with the most recent on the bottom of the list.



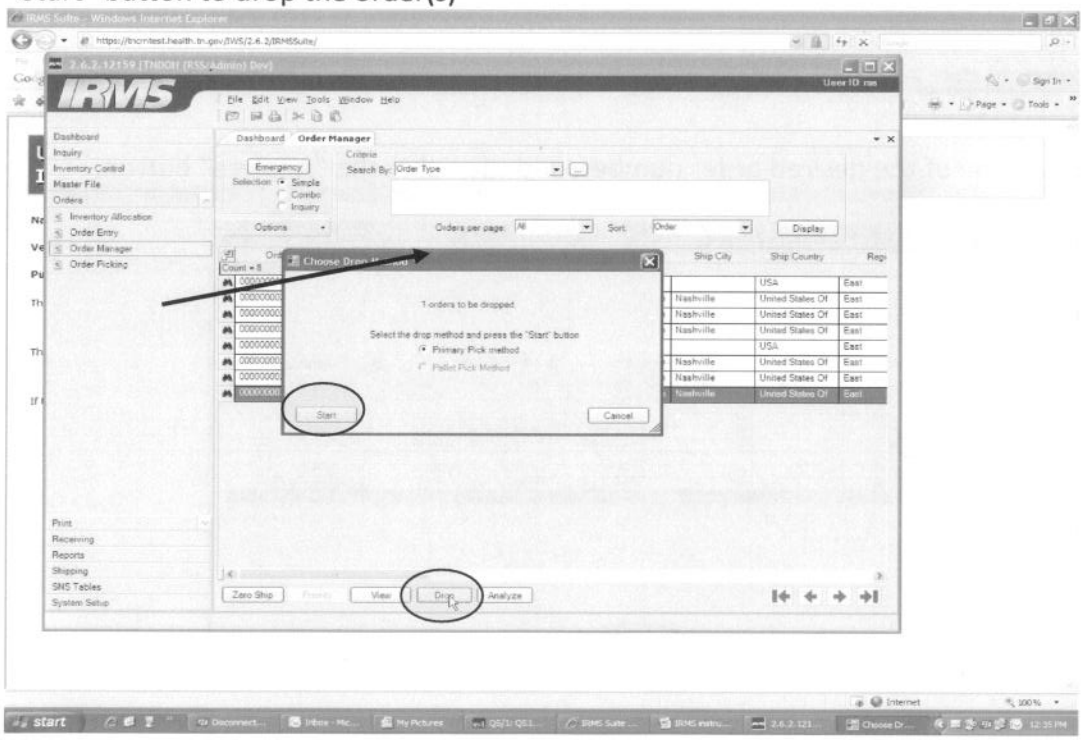
2. Click once on line of the desired order number, and then click the "Analyze" button.



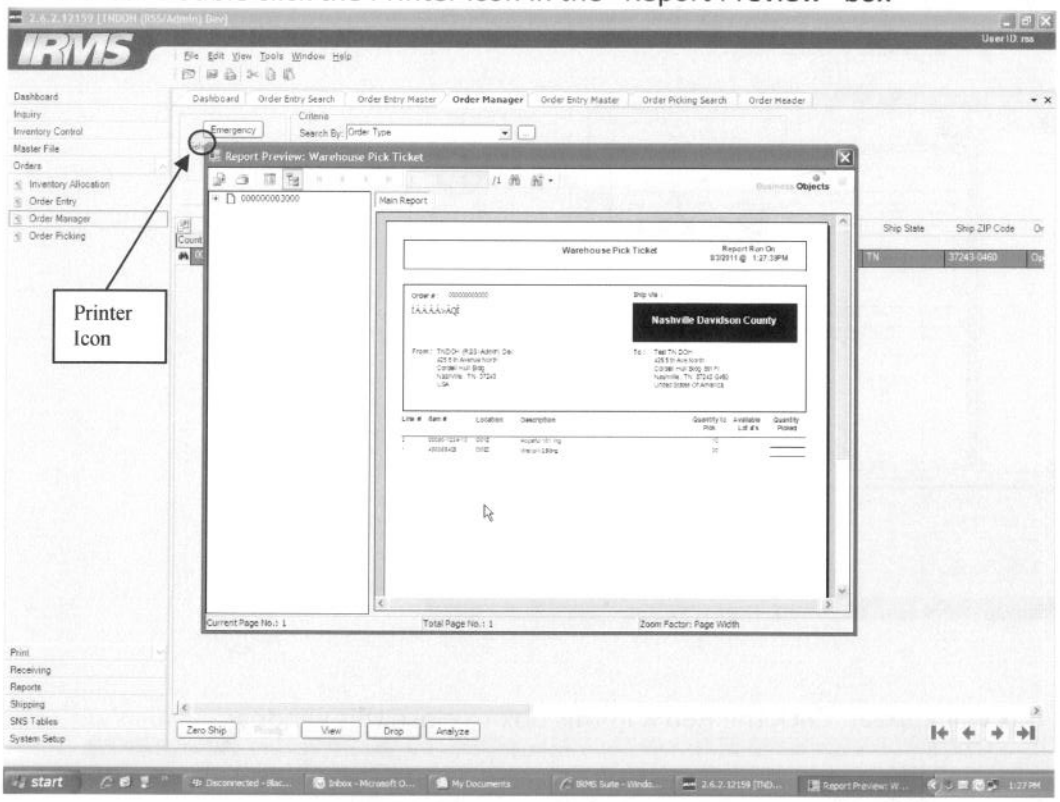
3. The next screen will show you how complete your order is based on the available stock in the warehouse. The "Fill Rate" column must show 100 for each line on the order. If the "Fill Rate" values are at 100, then press the close button.



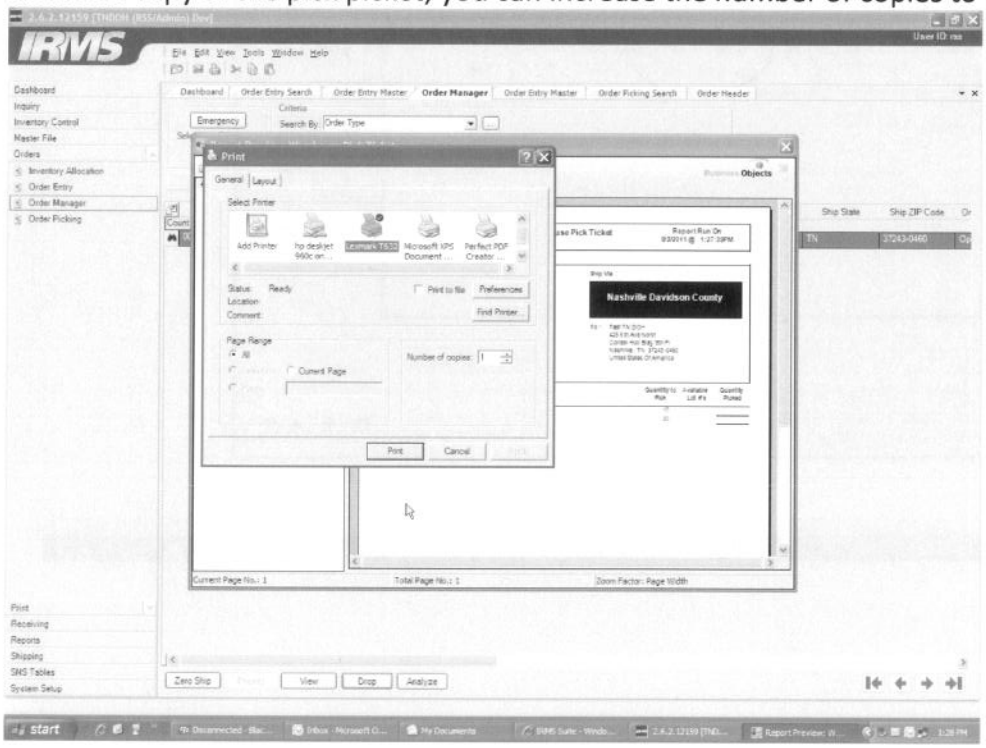
4. If the order is ready to go and at a 100 fill rate, highlight the order (or range of orders) and click "Drop" at the bottom of the screen. Make sure the "Primary Pick method" is selected, the press the "Start" button to drop the order(s)



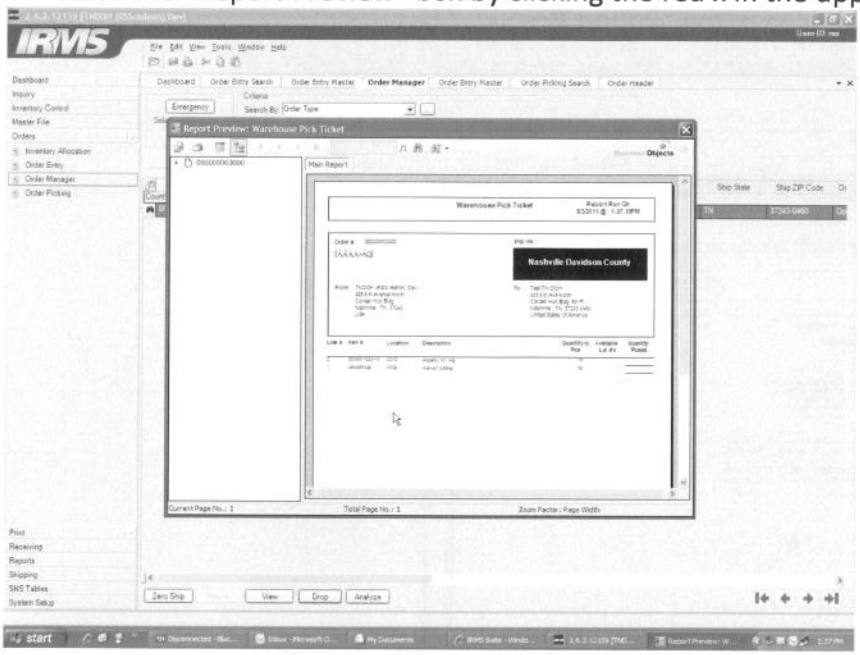
5. If the drop has been successful, you will see the following screen appear. You can now print the Pick Ticket. Double click the Printer icon in the "Report Preview" box



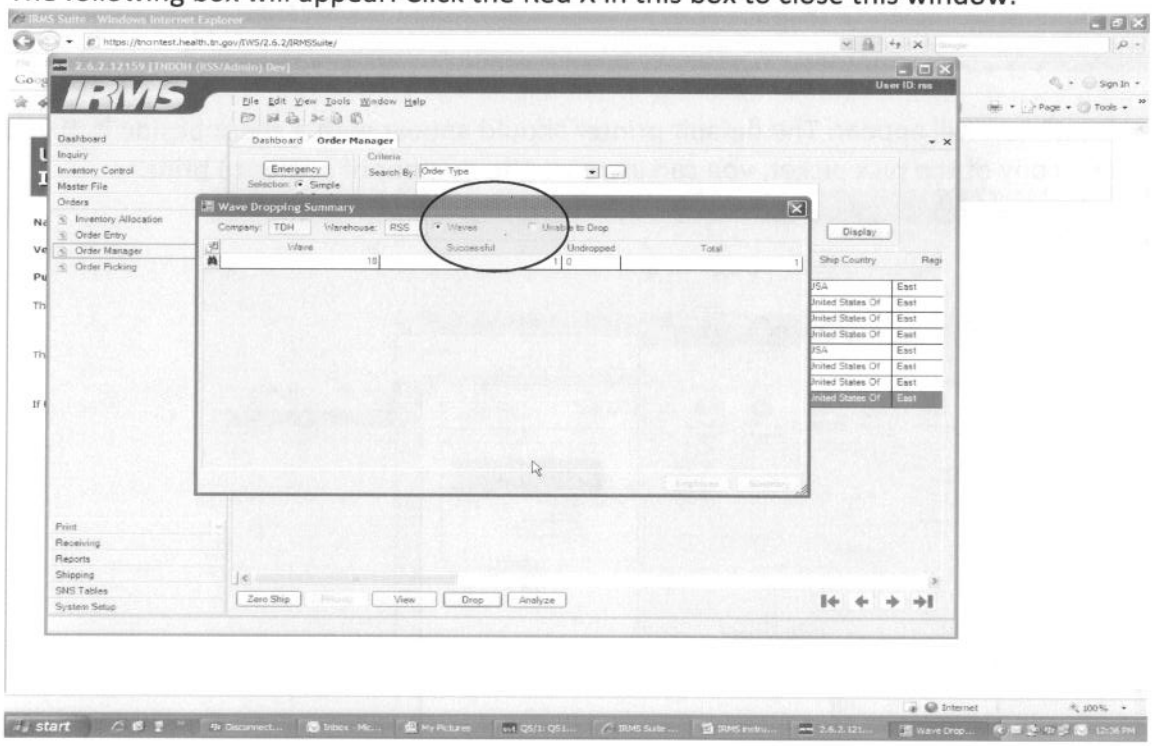
6. The "Print" box will appear. The default printer should appear with a check beside it. If you need more than one copy of the pick picket, you can increase the number of copies to print.



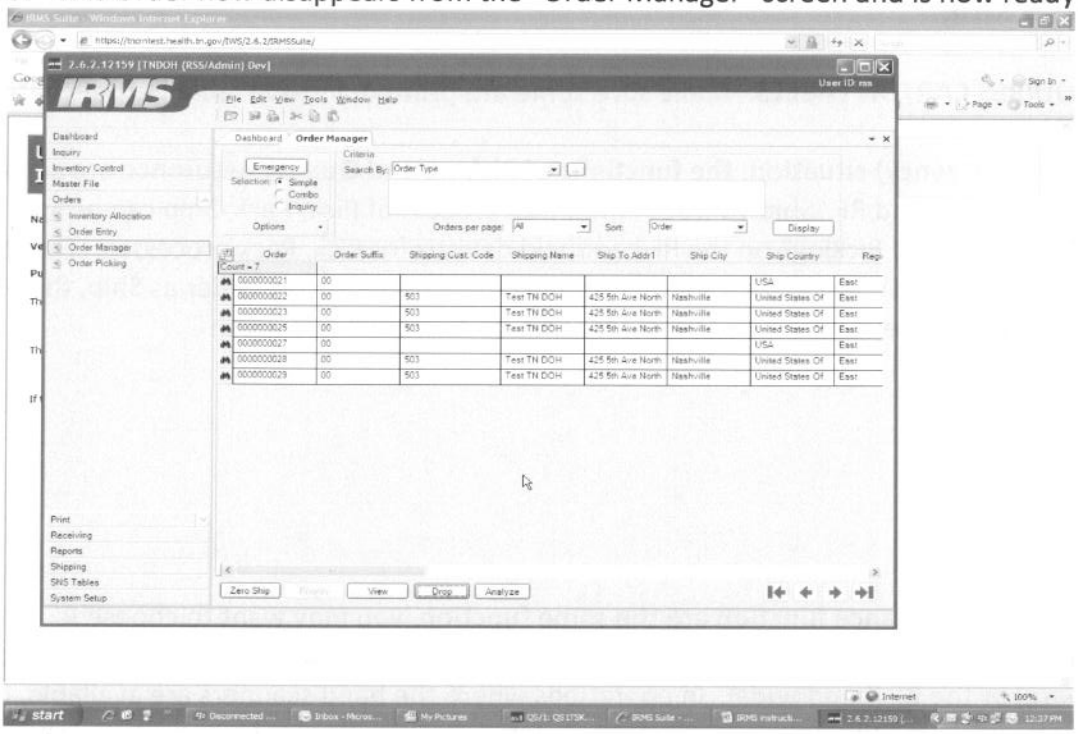
7. Close the "Report Preview" box by clicking the red x in the upper right hand corner OF THIS BOX.



8. The following box will appear. Click the Red X in this box to close this window.



9. This Order now disappears from the "Order Manager" screen and is now ready for "Order Picking"



Step 5 – Order Picking

ORDER PICKING REQUIRES CARTON LABELS. Make sure some are printed and available before continuing.

In an RSS Warehouse (emergency) situation, the functions of Picking and Quality Assurance are separate. Through RF "Standard Picking" and RF "Ship To Dock" the three process of Pick, Pack, Ship can be split out. Picking function will do "Standard Picking" on the RF handheld devices for Pick, Pack processes. The Quality Assurance function will do "Ship To Dock" on the RF handheld devices to mark the order as Ship, thus completing the entire process. Below are two documents that detail how this is done:

Quick Guide RF Standard Picking.pdf

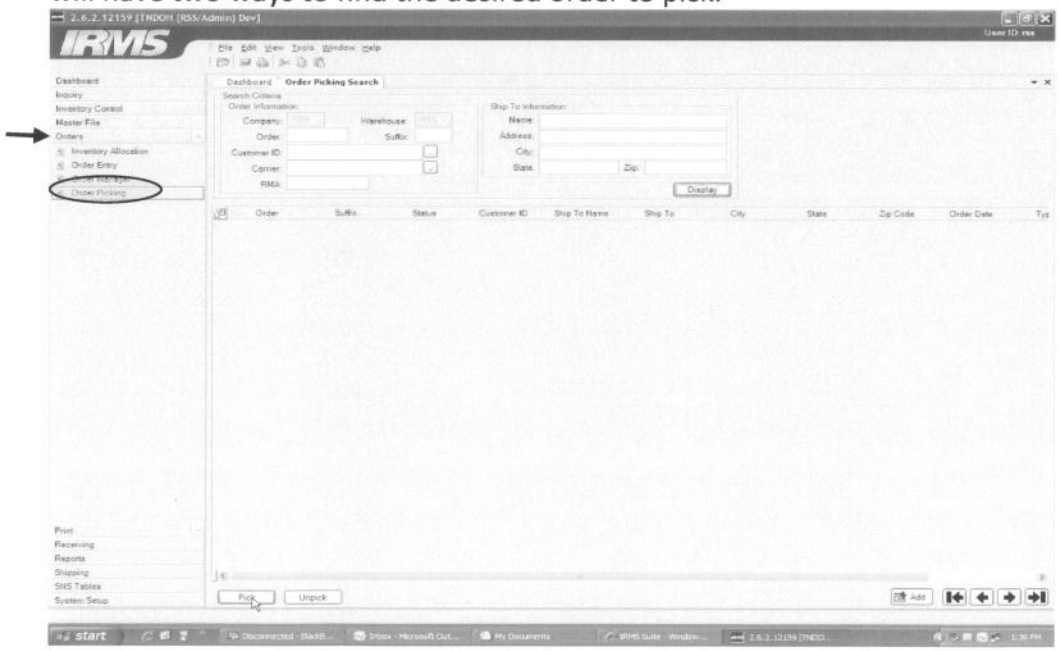
Quick Guide RF Ship to Dock.pdf

If your Picking and Quality Assurance function are the same function, you may want to choose RF "Quick Pick" or Order Picking that does Pick, Pack, Ship in all one process. It can be done on the client (desktop version of the software) or the RF (handhelds). In operations where the hand scanners are available, this step can be performed by the pickers utilizing this equipment. A detailed Quick Guides for the "RF Quick Pick" method is embedded below and available on the TEMARR website:
http://health.state.tn.us/TEMARR/InvMgt.shtml

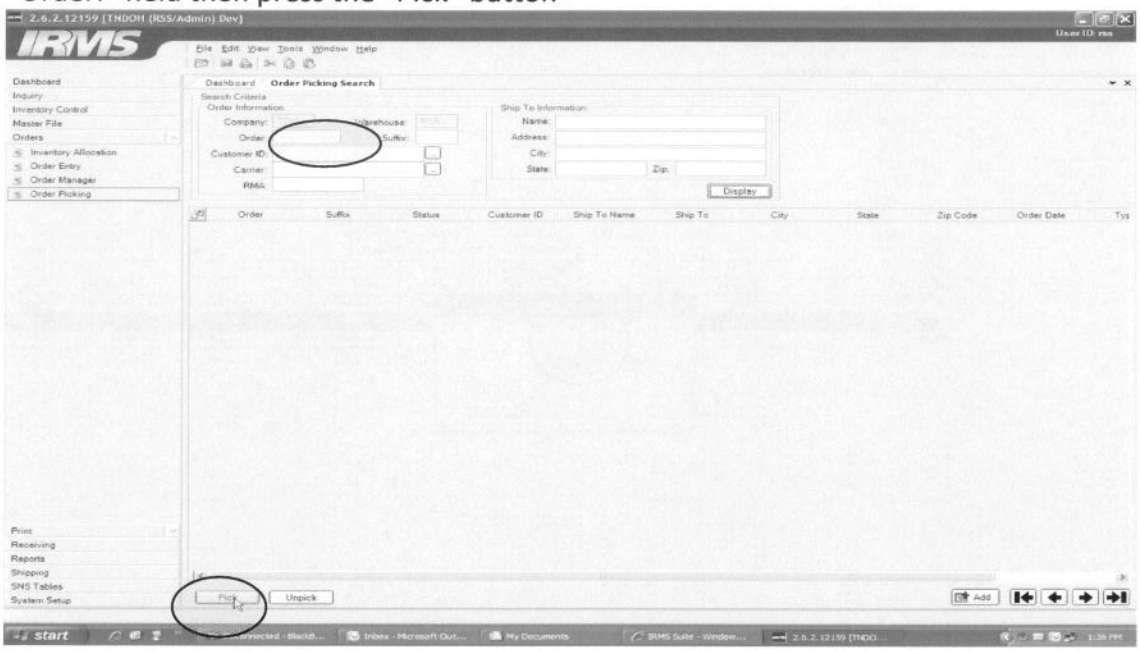
Quick Guide RF Quick Pick 2010.pdf

Instructions for how to do "Quick Pick" on the client (desktop version of the software) are below:
These instructions are meant to serve as an alternative in case of equipment failure or technical difficulties. In this situation, the inventory control staff will assist the pickers with this function.

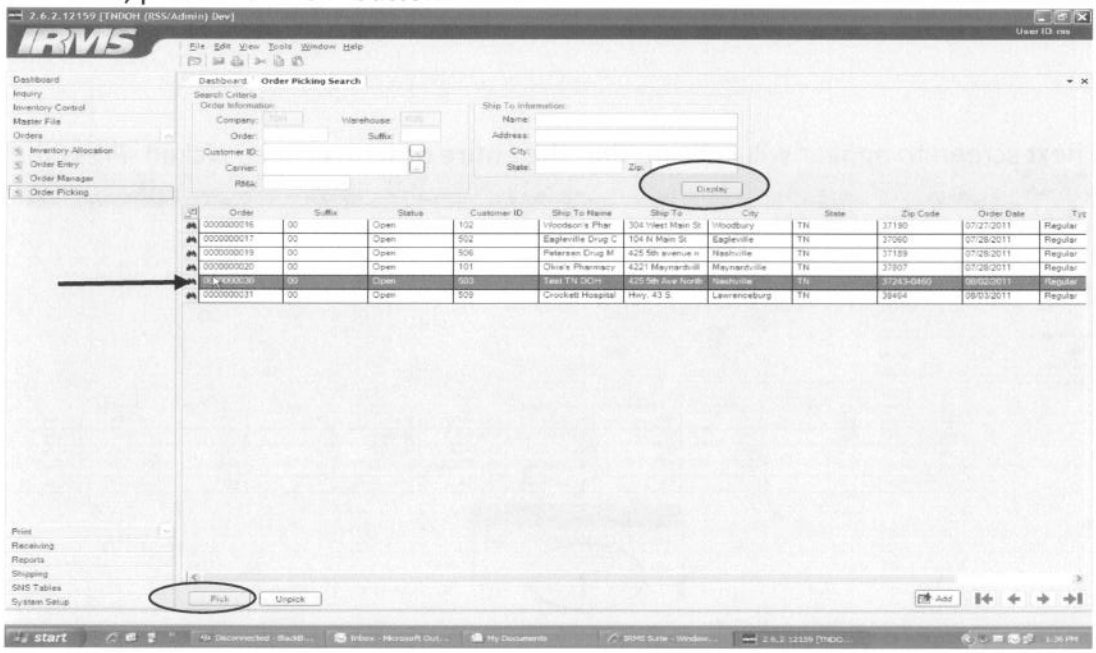
1. Under the "Orders" tab, double click on the "Order Picking" tab. The following screen will appear. You will have two ways to find the desired order to pick.



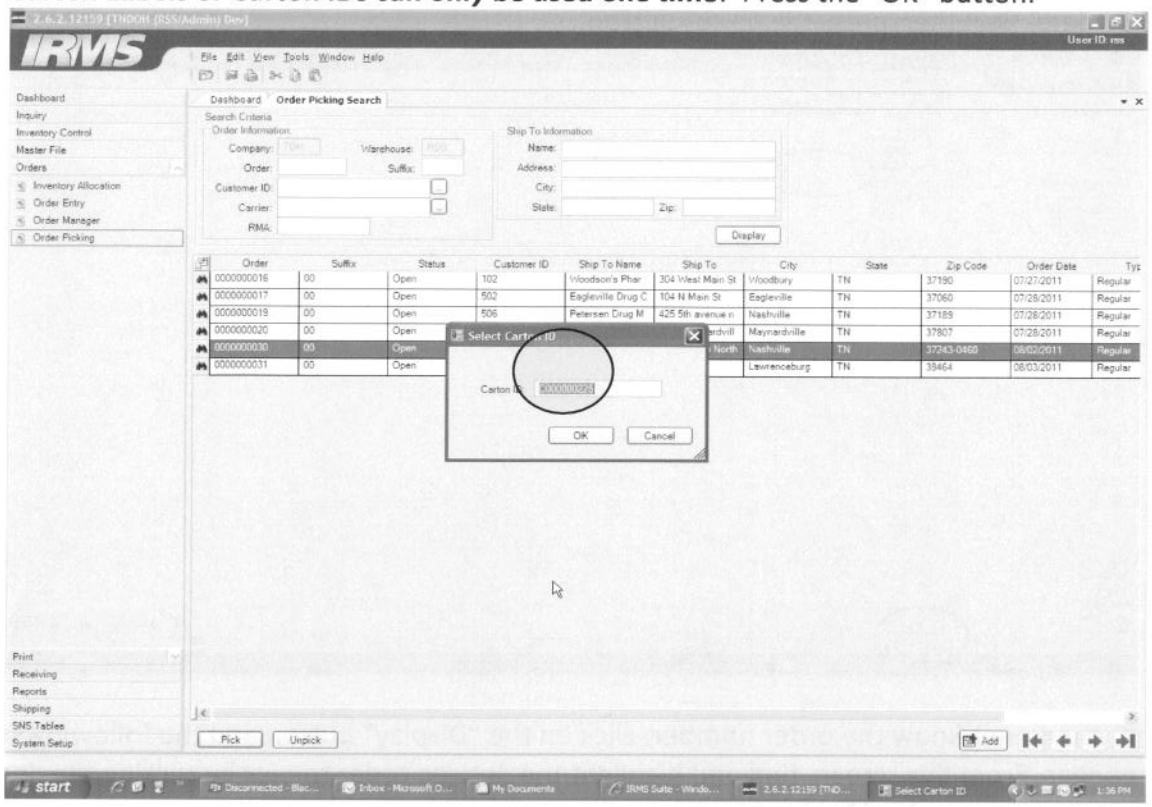
a. If you know the order number, simply enter this order number in the white blank next to the "Order:" field then press the "Pick" button



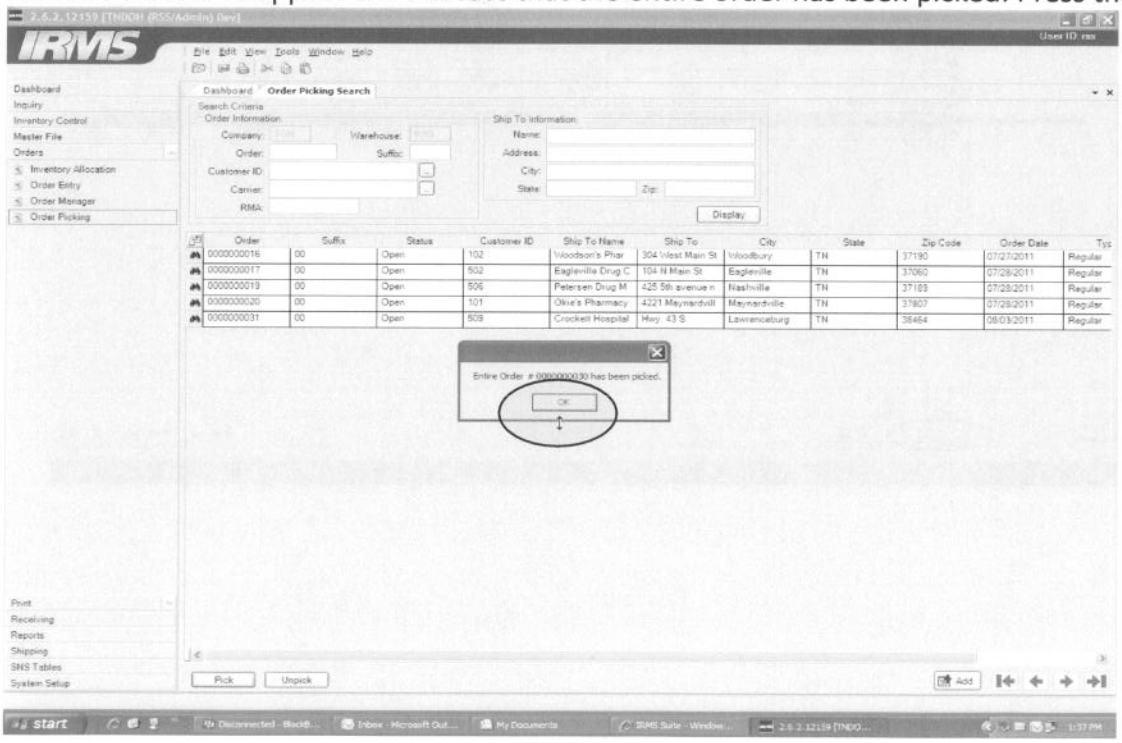
b. If you do not know the order number, click on the "Display" button and the following screen will appear. From this screen, find and highlight the desired order to pick by clicking the line. After selection, press the "Pick" button.



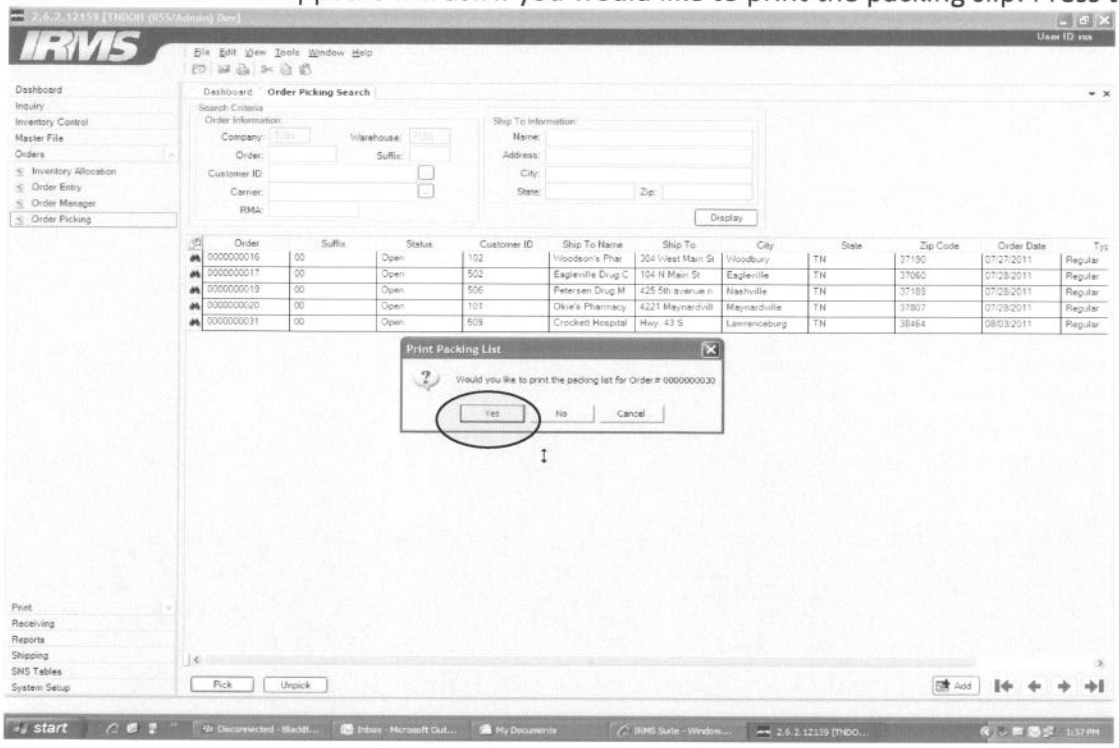
2. The system will assign a unique "Carton ID" number to the order to be picked (see below). ***These Carton Labels or Carton IDs can only be used one time***. Press the "OK" button.



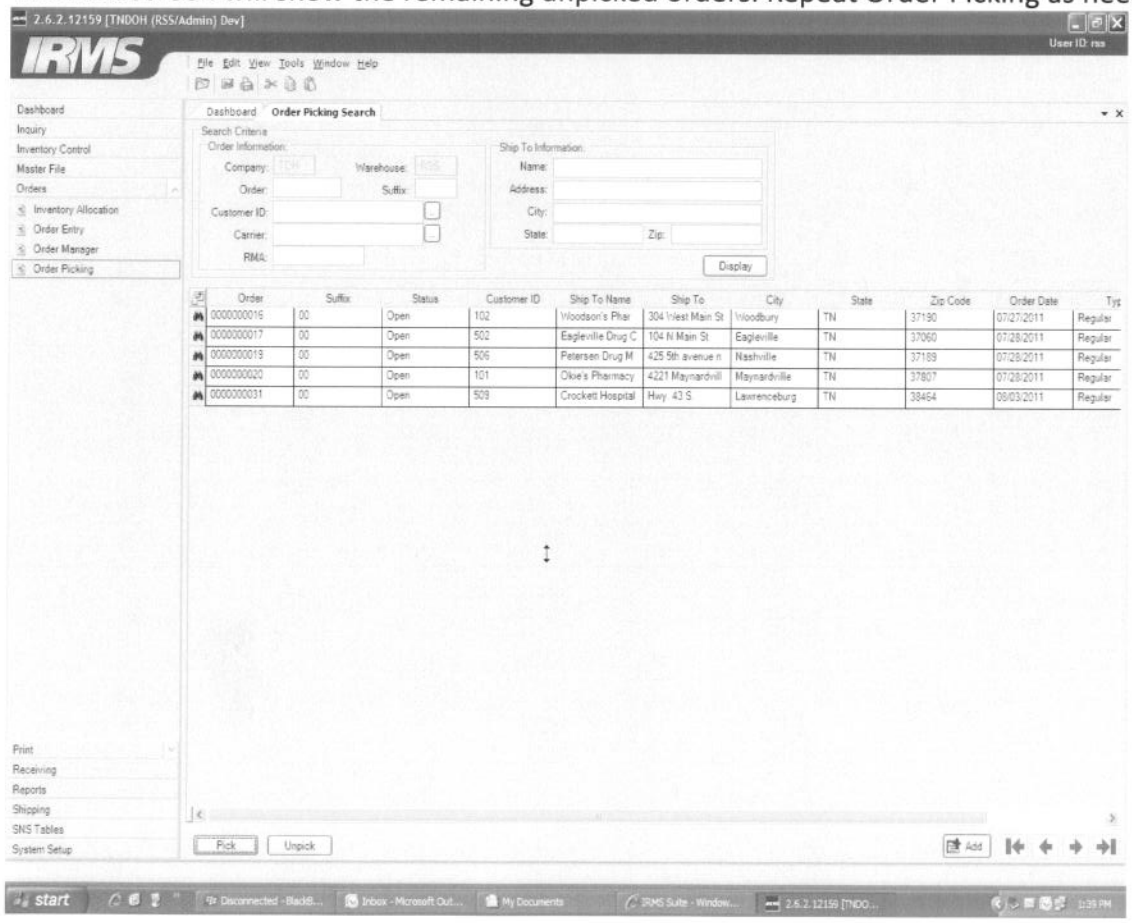
3. The next screen to appear will indicate that the entire order has been picked. Press the "OK" button.



4. The next screen that appears will ask if you would like to print the packing slip. Press the "Yes" button.



The next screen will show the remaining unpicked orders. Repeat Order Picking as needed.



Strategic National Stockpile (SNS)
Chain of Custody Procedure for Receipt, Stage, Store (RSS) Warehouse
Updated 8-8-2011

Chain of Custody Procedure:

1. Print additional copies of the Packing List from Inventory Management system.
   a. If shipping from the RSS Warehouse to a Regional Distribution Site (RDS) or Secondary Distribution Center (SDC), print 6 total copies.
   b. If shipping from the RSS Warehouse directly to the final destination, print 4 total copies.

2. Each person in the chain needs to **SIGN & DATE EVERY COPY OF THE ATTACHED PACKING LISTS**.

   1. RSS DACO, RSS Pharmacist or designee (control copy)
   2. Driver #1
   3. Person at POD, Hospital or RDS
   4. Driver #2 (if RDS)
   5. Person at POD, Hospital or final destination
   6. TN Dept. of Health file copy

3. Each person in the chain needs to **KEEP ONE COPY OF THE ATTACHED PACKING LISTS**.

4. When the shipment reaches its final destination, the person signing for the shipment must put the last copy of the packing list, with all signatures in the chain, in the attached self-addressed envelope or **MAIL FINAL COPY TO**:

   Laina Stanford
   SNS Logistics Specialist
   Tennessee Department of Health
   425 5th Ave North,
   1st Floor, Cordell Hull Bldg
   Nashville TN 37243

QUESTIONS? Please contact Laina Stanford at:
Work: 615.532.6267
Cell: 615.290.0933
SNS Hotline: 866.327.9106
Laina.Stanford@tn.gov