Chapter 11
Requisitions

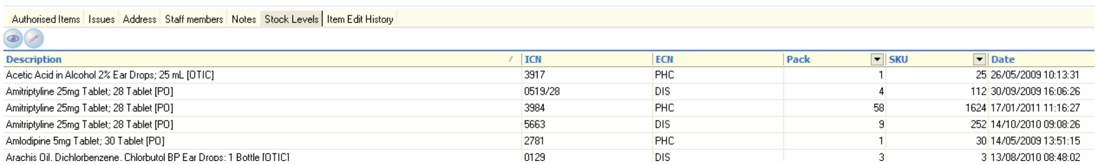
This chapter—

- Provides an overview of the use of requisitions in RxSolution
- Explain the difference between Requisitions and Demander Transfers.
- Familiarizes the user with how to—
  - Generate and complete requisitions
  - Delete or edit products listed on a requisitions
  - Issue products on requisitions
  - Edit requisitions
  - Produce a picking lists
- Explains how RxSolution can be used to manage demander requests, receipts, and budgets

What is the difference between a Requisition and a Demander Transfer?

Requisition

A requisition is a financial transaction by means of which a demander or client (e.g., a ward or a clinic) requests products from your store. This stock can only be issued in whole units meaning if the item is a pack of 100 Tablets, only packs of 100's can be issued.
Once the requisition has been issued, the stock moves from the Bulk store to the Demander stock. Demander stock is viewed in Demanders, Stock levels tab. See below, ***Demander Transfer.***


Authorised Items | Issues | Address | Staff members | Notes | Stock Levels | Item Edit History

Description	ICN	ECN	Pack	SKU	Date
Acetic Acid in Alcohol 2% Ear Drops; 25 mL [OTIC]	3917	PHC	1	25	26/05/2009 10:13:31
Amitriptyline 25mg Tablet; 28 Tablet [PO]	0519/28	DIS	4	112	30/09/2009 16:06:26
Amitriptyline 25mg Tablet; 28 Tablet [PO]	3984	PHC	58	1624	17/01/2011 11:16:27
Amitriptyline 25mg Tablet; 28 Tablet [PO]	5663	DIS	9	252	14/10/2010 09:08:26
Amlodipine 5mg Tablet; 30 Tablet [PO]	2781	PHC	1	30	14/05/2009 13:51:15
Arachis Oil, Dichlorbenzene, Chlorbutol BP Ear Drops; 1 Bottle [OTIC]	0129	DIS	3	3	13/08/2010 08:48:02

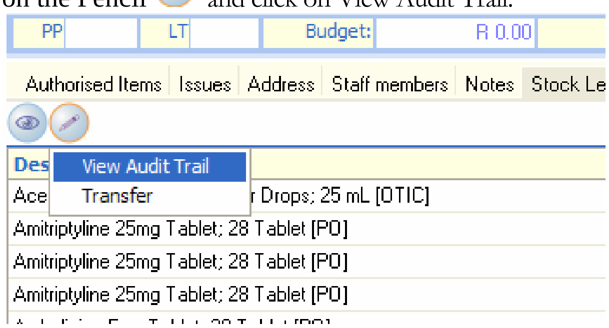
Demander stock is now in Dispensing Stock-Keeping Units (SKU) such as Tablets, Ampoules, Milliliters. This Stock can be used to Dispense from or issue to another Demanders in SKU's

To Summaries,   A requisition is to move Bulk stock from the main store to Demander stock sucj=h as wards and pharmacies.

Demander Transfer

A Demander Transfer is a financial transaction by means of which a Demander or client requests products from another Demander. The Stock then moves between Demanders in SKU sizes.

All transaction of Demander stock can be viewed in the Demander Stock levels Audit trail. Click on the Pencil and click on View Audit Trail.



Now the Transactions and stock on hand can be viewed, See Chapter 10

Requisitions

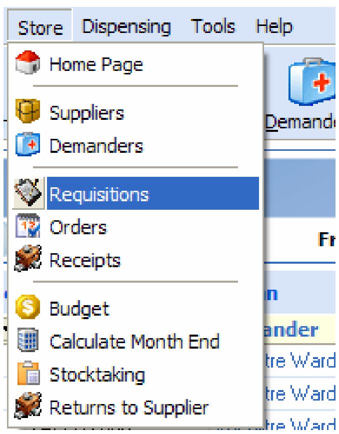
How Do I Get to the Requisitions Screen?

1. Click on the **Requisitions** icon 

on the toolbar.

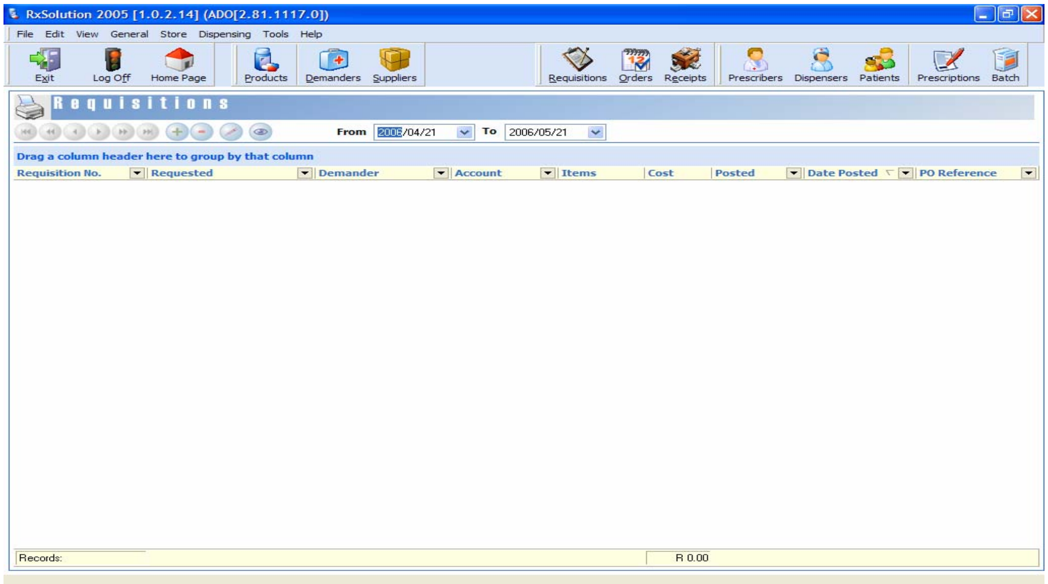
2. Alternatively, click on **Store** on the menu bar.

3. Choose **Requisitions** from the drop-down list.

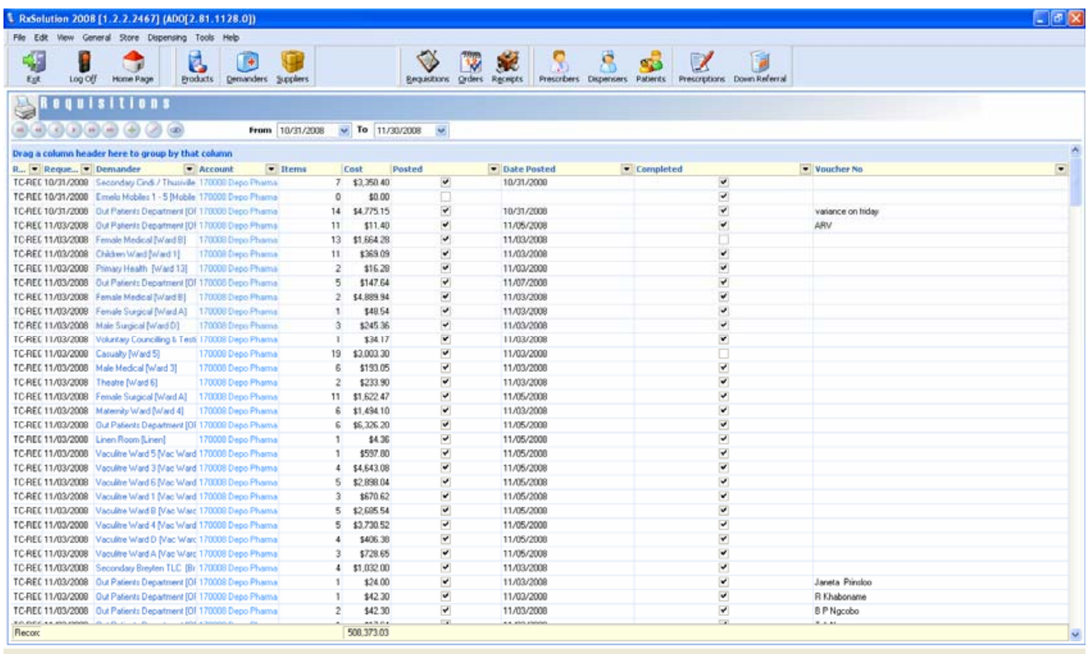


What Does the Requisitions Screen Look Like?

The image below shows what a requisitions screen looks like when RxSolution has no requisitions in the system.



The following image shows what the screen looks like when RxSolution has requisitions in the system. Summary information, including the demander, cost, number of items, and requisition status appears here.



If you double click on a requisition, you open up the detail screen for that requisition. Descriptions of the various parts of the detail screen are provided below.

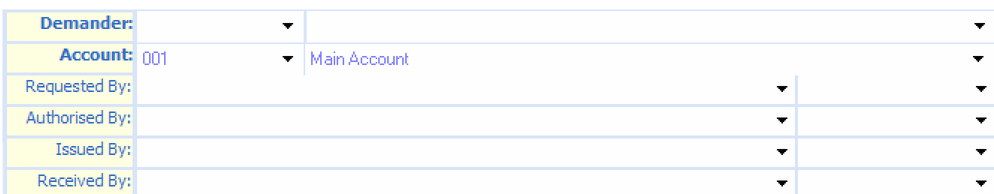
Requisition Number

The requisition number is displayed in the top right-hand corner of the **Requisitions** screen. Each requisition number is computer generated and is unique. Table 11-1 describes the components of a requisition number in RxSolution.

Table 11-1. Components of a Requisition Number in RxSolution

Component	Definition
FRE	The **System Prefix** location entered by a user (see "Record Numbering Tab" in chapter 2). Here, "FRE" is short for Frere Hospital.
RQ	The **Type Prefix** in the system. "RQ" means requisition (see "Record Numbering Tab" in chapter 2).
05	The year of the receipt (here, 2005).
02	The month of the receipt (here, February).
0002	The number of the receipt for this month (here, the second).

Detail Section

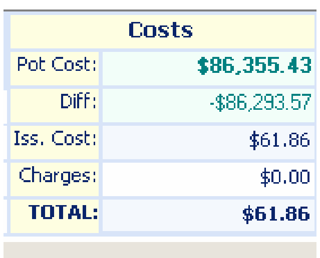


The detail section lists information about the **Demander**, the **Account** (which is set up in system settings and where the tax rate is set up), the person who made the request (**Requested By**), the person who authorized the requisition (**Authorised By**), the person who issued the requisition (**Issued By**), and the person who received the delivery of the requisition (**Received By**). Click on the arrow next to the desired field to reveal a list of possible options, dates, or both.

Requisition Information

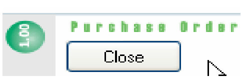
Requisition information is summarized in the top left-hand corner of the **Requisitions** screen. The date the requisition was created in RxSolution, the number of items on the requisition, and the voucher number are displayed. Posting is done by clicking on the **Post this Req.** button. A requisition should not be posted until no further changes need to be made to it. When the requisition is posted, the issued stock will be deducted from your stock. Stock quantities are placed on hold in RxSolution (as can be viewed on the **Product Catalog** screen) when an issue quantity is entered for an item and not yet posted. When the requisition is posted, the "on hold" notation will be deleted, and the stock on hand is deducted from the store stock.

Financial Information



Financial information is summarized in the top right-hand corner of the **Requisitions** screen. This section provides the detail of the cost of the requisition. The potential cost (**Pot Cost**) is the amount if the full quantities requested were issued. The issued cost (**Iss. Cost**) is the cost of the actual quantities issued. **Diff** indicates the difference between the two amounts.

Close Button



Even if the requisition is not yet finalized and needs further work, the screen can be closed by clicking on the **Close** button located on the bottom left-hand side of the screen.

Items Tab

This tab summarizes the items on the requisition. The item description and codes were defined in the system defaults. The terms specific to requisitions are detailed in Table 11-2. You may select which columns to display on the screen by clicking the "eye" icon  and choosing through the screen shown below.

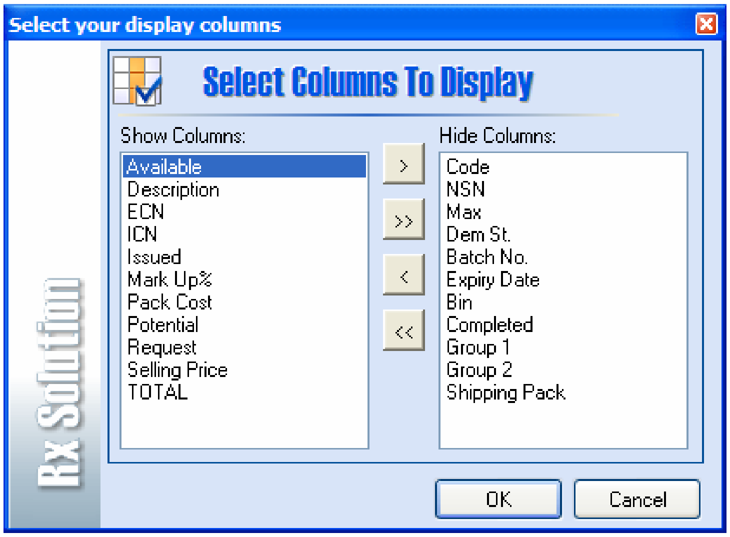


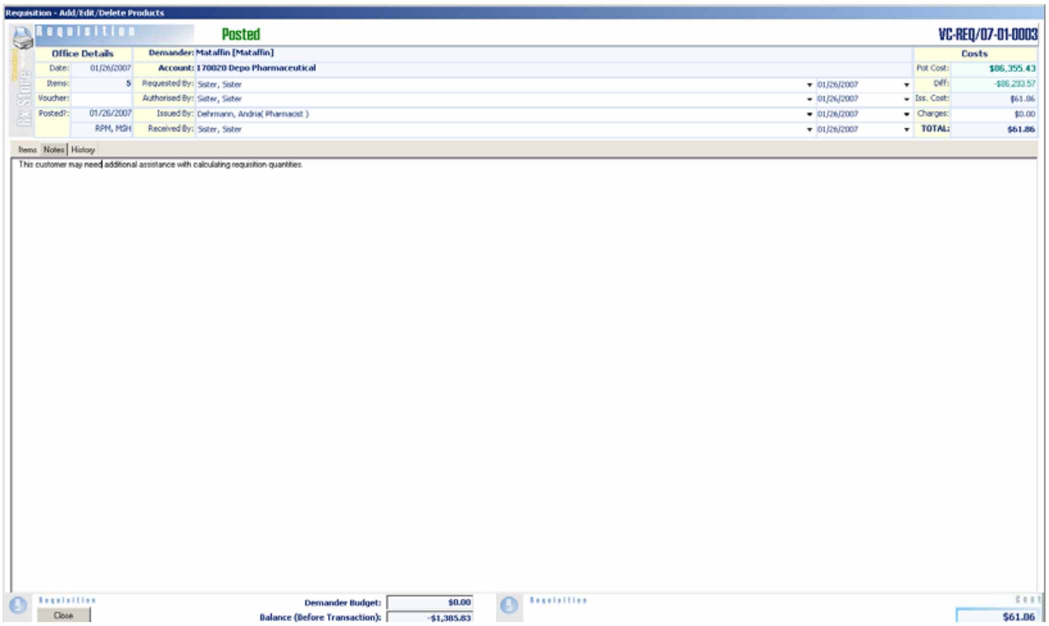
Table 11-2. Requisition Terms Used in RxSolution

Term	Description
Available	The available stock quantity in your facility's bulk store. This amount is calculated as quantity on hand minus quantity on hold.
Balance before this Transaction	How much the demander still has available before this requisition is issued.
Batch No.	Type in the number of the batch product issued. The batch number was issued by the supplier and is normally shown on the delivery slip.
Completed	RxSolution checks the completed column automatically when you issue the same quantity or more than what the demander has requested. If the quantity issued is less than requested and you do not consider back orders (requisitions) to demanders, check the box; otherwise, leave it empty.
Dem St.	The demander stock balance. The amount is to be captured from a demander order stock-take.
Demander Budget	How much money was allocated to the demander (see chapter 9, "Demanders" for details).

Term	Description
Expiry Date	The date on which the product expires, as indicated on the individual items (if applicable)
Issued	The quantity actually issued to a demander.
Mark Up%	The additional percentage to apply to the cost of an item, as specified in the product setup.
Max	The suggested maximum stock level of an item that the demander should keep on the shelf. The **Max** is used in the requested stock requisition quantity calculation from stock on hand and is defined in the demander module of the program.
Pack Cost	The actual cost price per pack charged by the supplier.
Potential	The potential cost of an item is based on the quantity requested.
Request	The quantity requested or demanded by the demander or client, or the quantity calculated from the formula: maximum stock minus demander stock on hand.
Selling Price	The price at which the product is sold: pack cost plus markup %.
TOTAL	The total cost of the quantity actually issued.

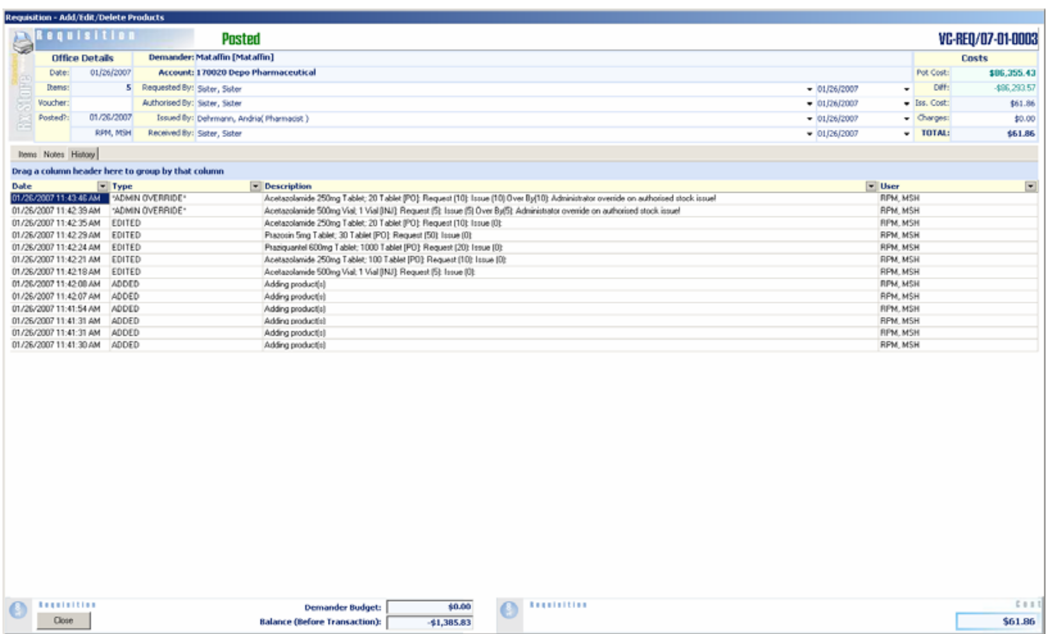
Notes Tab

Additional notes regarding the requisition can be entered here. The screen below provides an example of a notes entry.



History Tab

This section is where all the changes made (i.e., additions, deletions, editing) to the requisition are automatically tracked by RxSolution. The screen below provides examples of history records.



Using RxSolution to Manage and Track Requisitions

How Do I Create a Requisition?

1. Click on the **Requisitions** icon 

on the toolbar.

2. Click on the add new record icon  and the following screen appears—

3. Fill in the requested information by clicking on the gray down-facing arrow and choosing from the drop-down list that appears for each entry (**Demander**, **Requested By**, **Authorised By**, and **Received By**) along with the date for each. To select a user in the first, second, and fourth fields, that user's name must have previously been entered in the demander staff members list.

4. Click on the add new record icon .

5. Alternatively, click on the edit the current record icon .

6. Choose one of the first three options from the drop-down list.

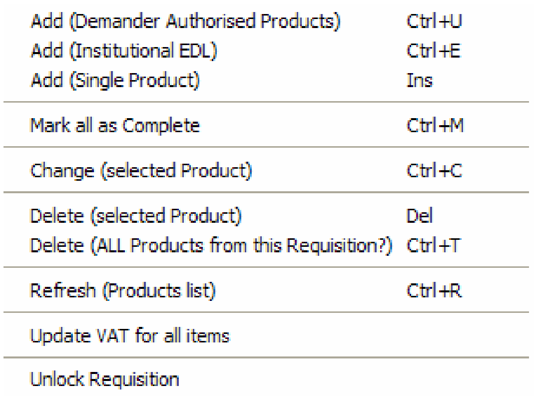


Table 11-3 describes the options available.

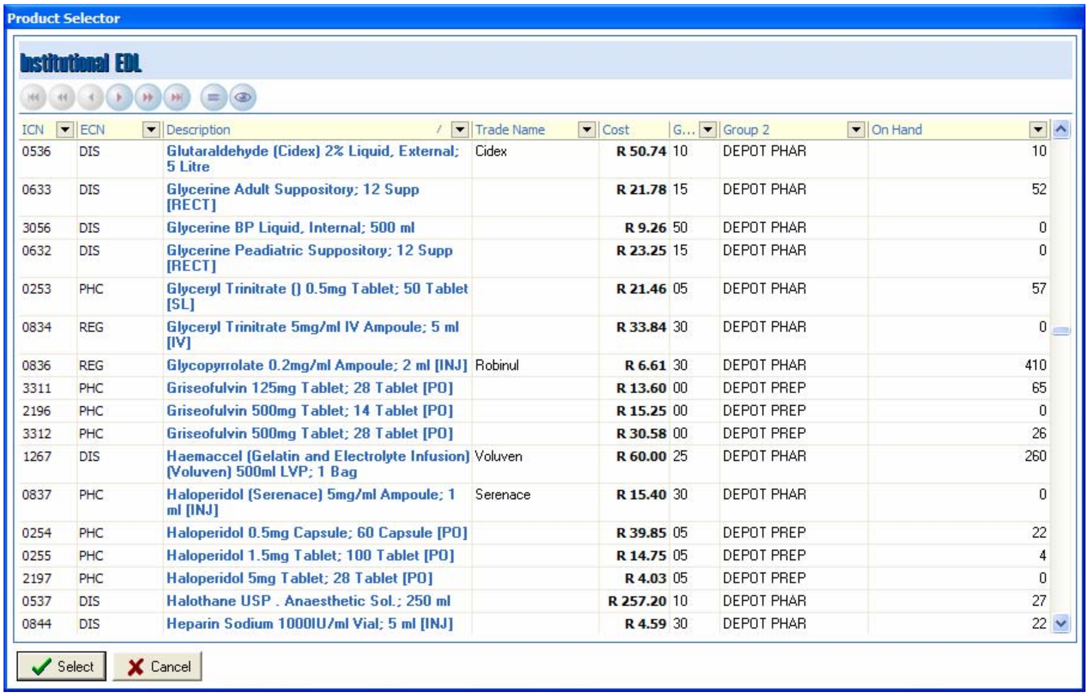
Table 11-3. Options for Adding Products to a Requisition

Option	Description
Add (Demander Authorised Products) Ctrl+U	All authorized products for the demander will be added to the requisition and you have to enter only the quantities.
Add (Institutional EDL) Ctrl+E	The whole institutional formulary or essential drugs list (EDL) will be added to the requisition.
Add (Single Product) Ins	The Product Selector screen will be displayed so you can select products to add to the requisition.

How Do I Add Single Products to My Requisition?

1. After choosing the last option described in Table 11-3, the following **Product Selector** screen appears—

Deleted: 10



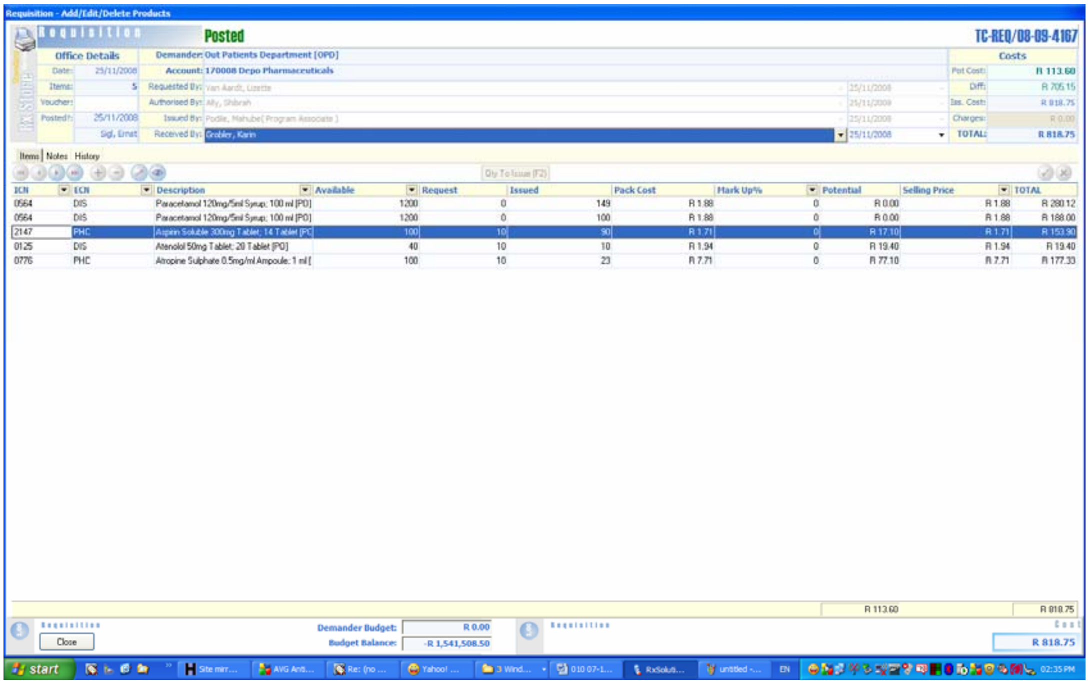
ICN	ECN	Description	Trade Name	Cost	G...	Group 2	On Hand
0536	DIS	Glutaraldehyde (Cidex) 2% Liquid, External; 5 Litre	Cidex	R 50.74	10	DEPOT PHAR	10
0633	DIS	Glycerine Adult Suppository; 12 Supp [RECT]		R 21.78	15	DEPOT PHAR	52
3056	DIS	Glycerine BP Liquid, Internal; 500 ml		R 9.26	50	DEPOT PHAR	0
0632	DIS	Glycerine Peadiatric Suppository; 12 Supp [RECT]		R 23.25	15	DEPOT PHAR	0
0253	PHC	Glyceryl Trinitrate () 0.5mg Tablet; 50 Tablet [SL]		R 21.46	05	DEPOT PHAR	57
0834	REG	Glyceryl Trinitrate 5mg/ml IV Ampoule; 5 ml [IV]		R 33.84	30	DEPOT PHAR	0
0836	REG	Glycopyrrolate 0.2mg/ml Ampoule; 2 ml [INJ]	Robinul	R 6.61	30	DEPOT PHAR	410
3311	PHC	Griseofulvin 125mg Tablet; 28 Tablet [PO]		R 13.60	00	DEPOT PREP	65
2196	PHC	Griseofulvin 500mg Tablet; 14 Tablet [PO]		R 15.25	00	DEPOT PREP	0
3312	PHC	Griseofulvin 500mg Tablet; 28 Tablet [PO]		R 30.58	00	DEPOT PREP	26
1267	DIS	Haemaccel (Gelatin and Electrolyte Infusion) (Voluven) 500ml LVP; 1 Bag	Voluven	R 60.00	25	DEPOT PHAR	260
0837	PHC	Haloperidol (Serenace) 5mg/ml Ampoule; 1 ml [INJ]	Serenace	R 15.40	30	DEPOT PHAR	0
0254	PHC	Haloperidol 0.5mg Capsule; 60 Capsule [PO]		R 39.85	05	DEPOT PREP	22
0255	PHC	Haloperidol 1.5mg Tablet; 100 Tablet [PO]		R 14.75	05	DEPOT PREP	4
2197	PHC	Haloperidol 5mg Tablet; 28 Tablet [PO]		R 4.03	05	DEPOT PREP	0
0537	DIS	Halothane USP . Anaesthetic Sol.; 250 ml		R 257.20	10	DEPOT PHAR	27
0844	DIS	Heparin Sodium 1000IU/ml Vial; 5 ml [INJ]		R 4.59	30	DEPOT PHAR	22

2. Select products to add to the requisition by using any of the methods shown in Table 11-4.

Table 11-4. Methods of Selecting Products for a Requisition

Action	Results
Click on one product, and click on **Select**	One product is added to the list.
Click on the first product you are choosing, hold down the *Ctrl* key and click on other products required, and then click on **Select** .	Many nonconsecutive products can be added to the list.
Hold down the *Shift* key, press the *Page Down (PgDn)* key or down-facing arrow on the keyboard (↓) and click on **Select** .	Many consecutive products can be added to the list.

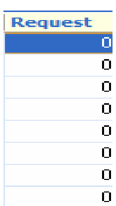
3. The products you have selected have been added to the requisition.



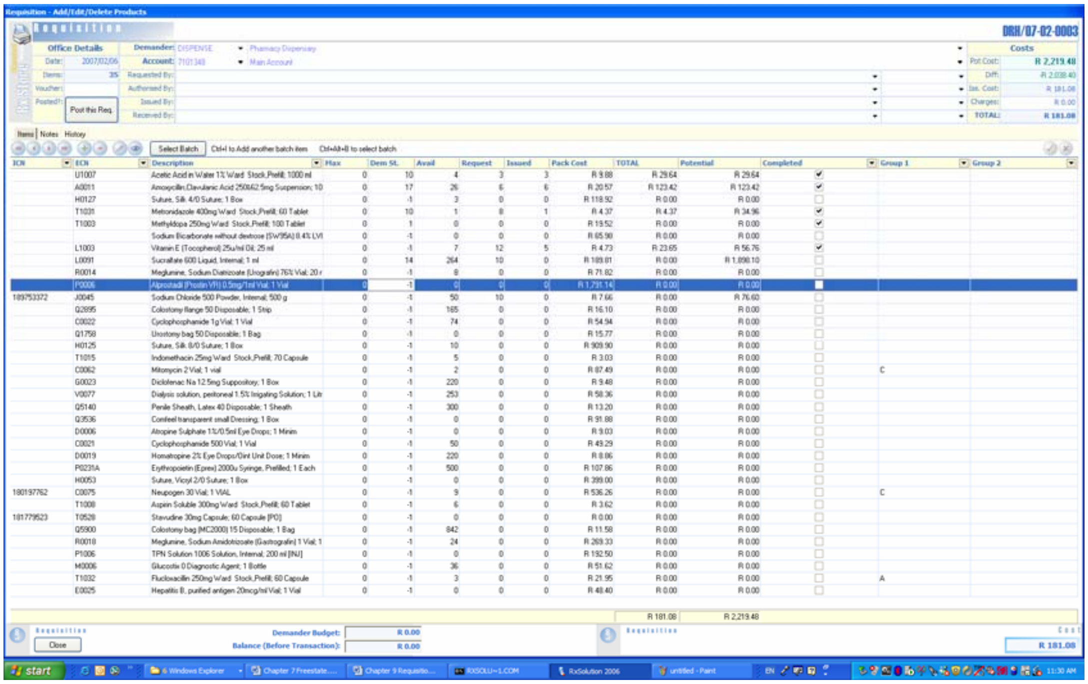
The default value for the demander stock is –1 to differentiate it from 0 stock on hand.

4. You can use either of two methods to add quantities requested to the requisition—

   a. Type the quantities being requested in the **Request** column.

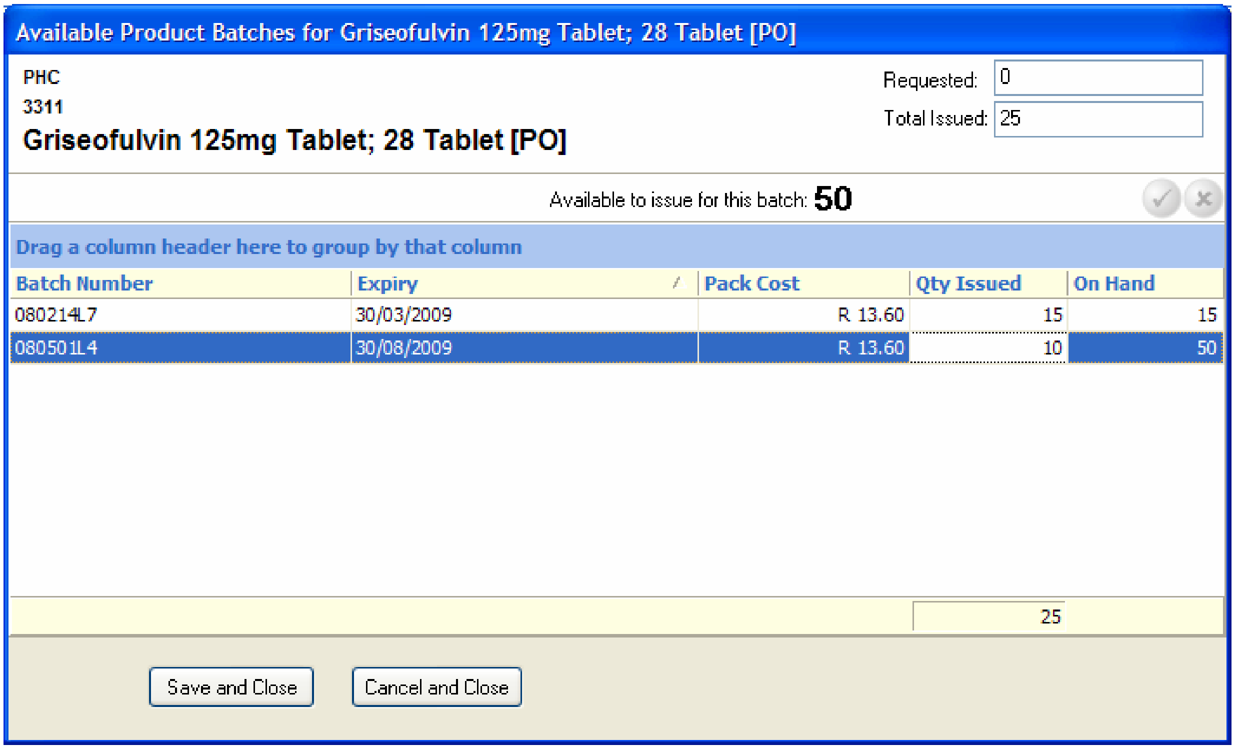
   b. Use the **Maximum** option. In this method, the amounts requested are calculated automatically, using the difference between the demander's maximum and the demander's stock on hand (**Dem St.**). The amounts suggested may be changed if necessary. For example, an item has an authorized maximum quantity of 100 as set up in the demander screen. The demander stock on hand is 20. Then the system will calculate 100 – 20 = 80, and 80 is automatically entered into the **Requested** column. (See chapter 9, "Demanders" for details.)



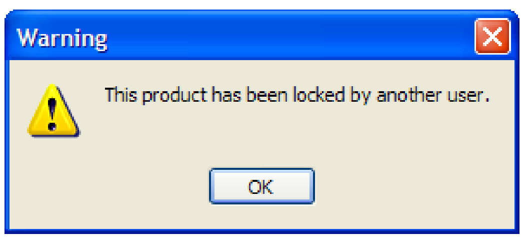
5. The **Available** quantity shown is the quantity on hand minus the on hold quantity from unposted requisitions.

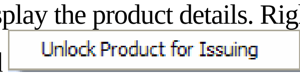
6. Enter the quantity expected to be issued. Do this by double clicking on the issued field for a required product, or press the *F2* key, or click on the Qty To Issue (F2) button.

7. Enter the quantity to issue from the appropriate batch/expiry date. If more than one batch number/expiry date needs to be used, enter the quantities for each. Normally, you should choose to issue the batch that is expiring soonest.

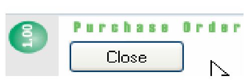


8. Click on the **Save and Close** button to register your changes. If more than one batch number is used, two lines will be created for the same product on the requisition. Use the same procedure to edit quantities. Note: No two persons can enter this screen for the same product at the same time. If a second user tries to enter the screen when it is already in use, a locked warning will be displayed.



9. In the event of an illegal exit of the program, the item will remain locked. To unlock, go to **Products**, find the item, and double click to display the product details. Right click anywhere on the screen and the following message will be displayed 

. Click on the message to unlock.

10. Click on the **Close** button 

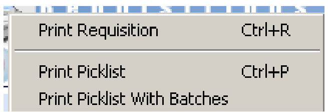
to close the requisition.

> *Note:* The issue quantity of the stock is placed on hold when the number is entered into the requisition field. The issued products are not deducted from your stock balance until the requisition is posted.

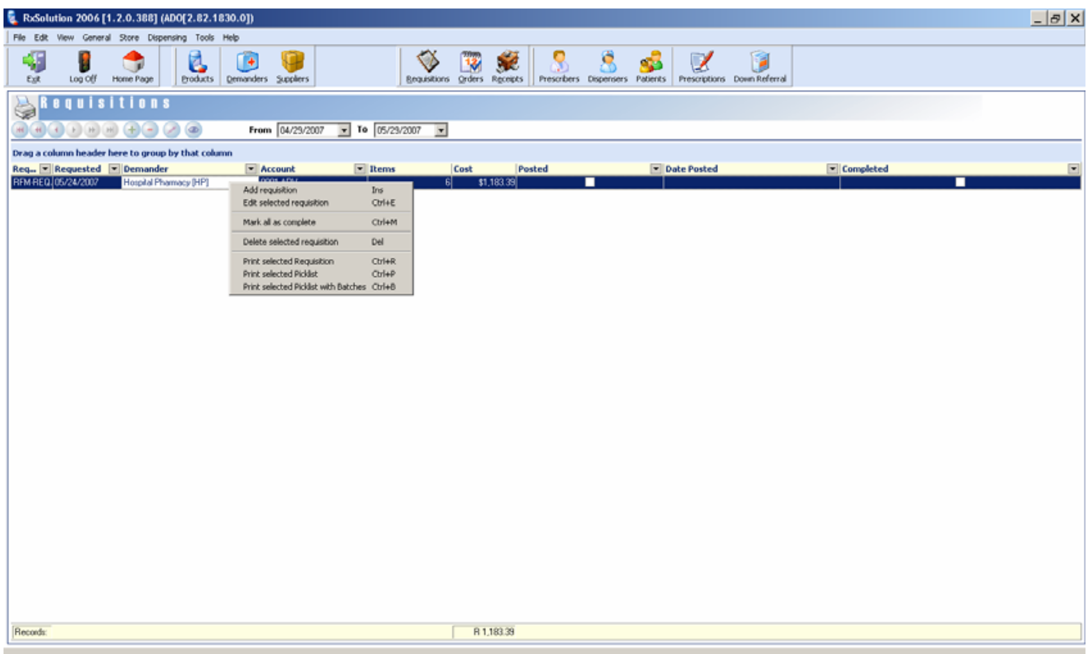
How Do I Print My Picking List?

1. Choose the requisition, and right click on the printer icon  .

2. Choose one of the **Print Picklist** options.

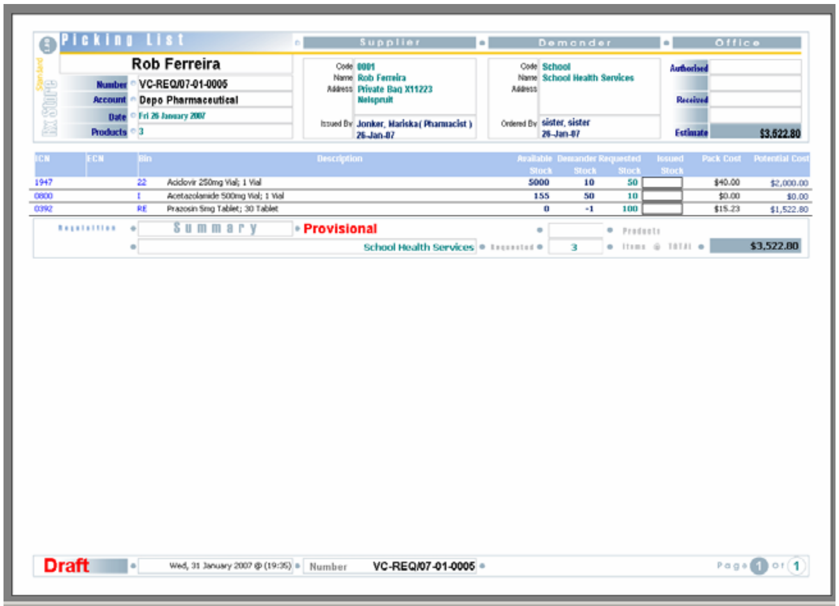


3. Alternatively, right click on the selected requisition, and choose one of the **Print selected Picklist** options. If you are managing stock by batch and want to issue specific batches in a requisition, print the picking list with batches so that the picker knows what to select from the shelves.

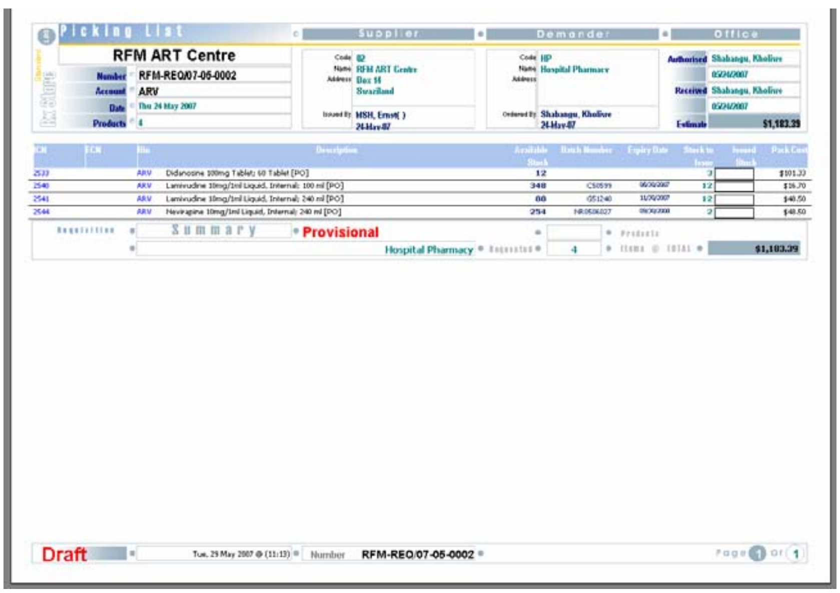


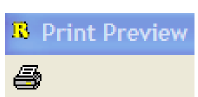
4. The **Picking List** preview is displayed.

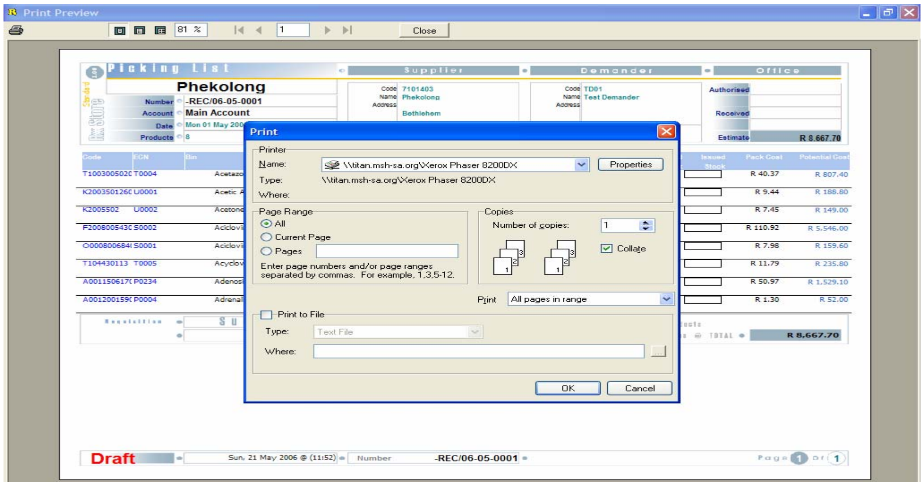
The screen below shows the picking list without batches—



The picking list with batch and expiry date information is shown below—



5. Click on the printer icon , and click on **OK** on the print screen to print the picking list.



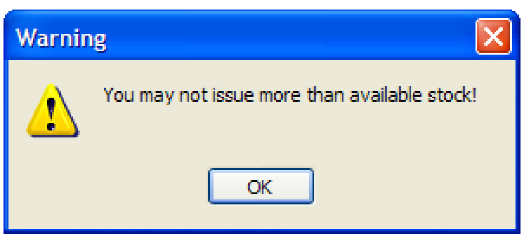
6. A picker takes the printed list, goes to the store, and physically picks the products to be issued. Listing the batch numbers and expiry dates on the picking list is important if the store procedure requires picking specific batches and expiry dates. If the picker does not collect what the list states, he or she must record any difference on the picking list and that information must be entered in RxSolution.

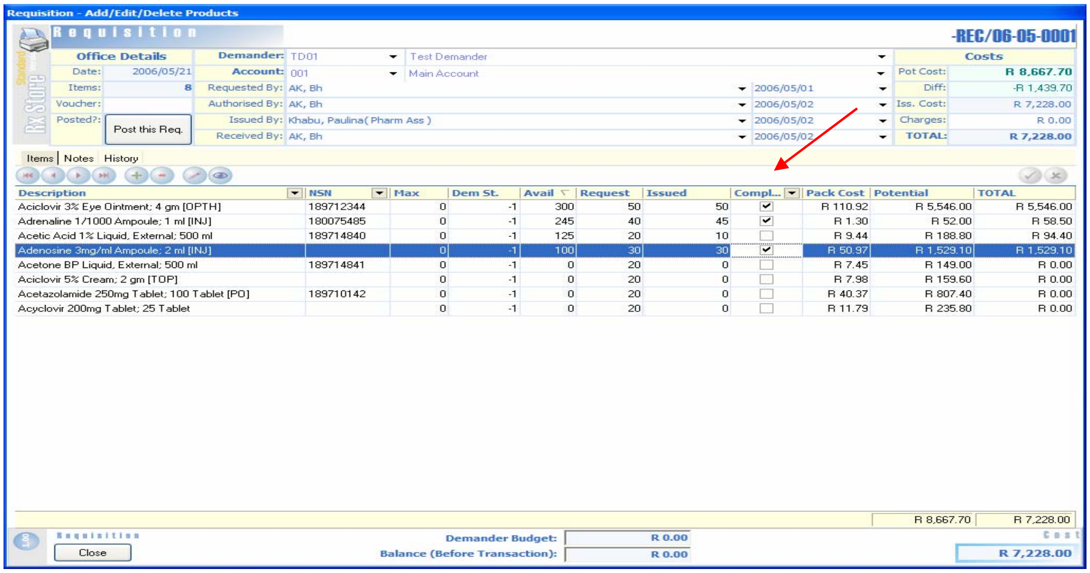
7. Open the requisition (if closed) to change the quantities to the actually issued quantity in the **Issued** column.

8. If you had set a maximum for the demander, you would need to issue only the difference between demander stock and maximum.

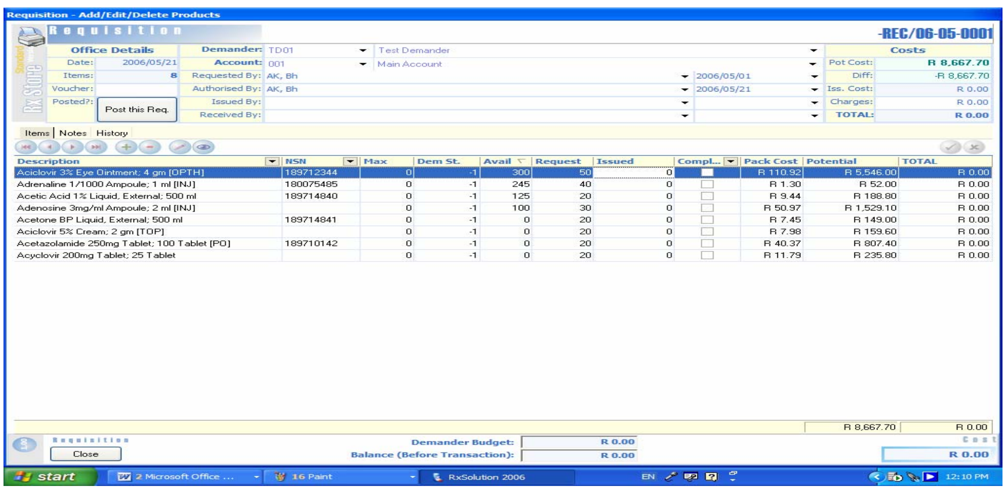
9. RxSolution checks the **Completed** column automatically when you issue the same quantity or more than what the demander has requested.

> *Note:* You cannot issue more than the available quantity of a product. If the amount of your request exceeds the amount of available stock, you will see the warning below.





10. Click on **Post this Req.** to post the requisition. (See "How Do I Post a Requisition?" for details.)



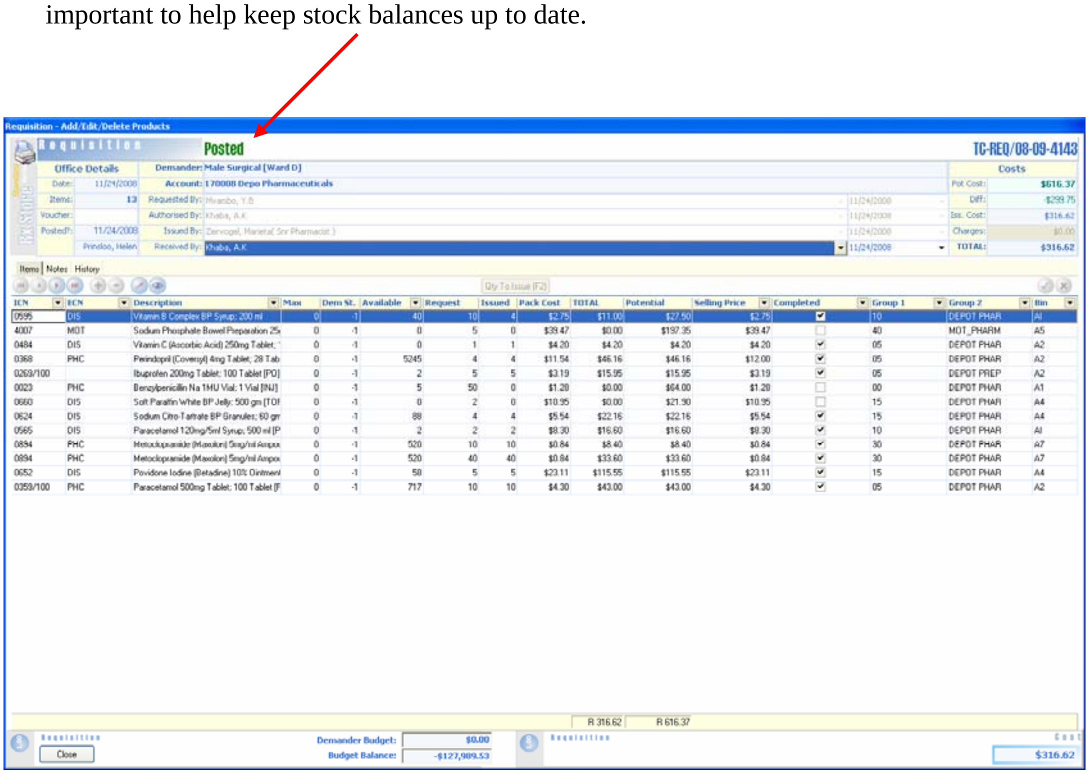
How Do I Post a Requisition?

1. When you are sure you have finished with the requisition, click on **Post this Req**.

2. The following warning screen will appear—

3. Click on **Yes** if you are sure that no further changes need to be made to the requisition, or click on **No** to cancel.

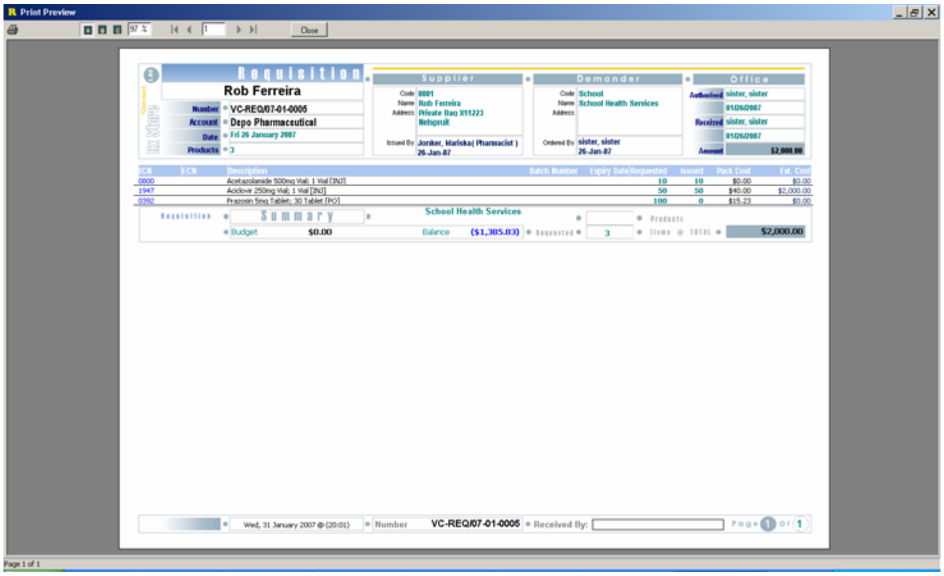
4. The requisition is now posted and marked as such. Taking this action subtracts the issued quantities from your available stock balance. Posting requisitions when they are ready is important to help keep stock balances up to date.



How Do I Print a Requisition?

1. Choose the requisition, and right click on the printer icon  .

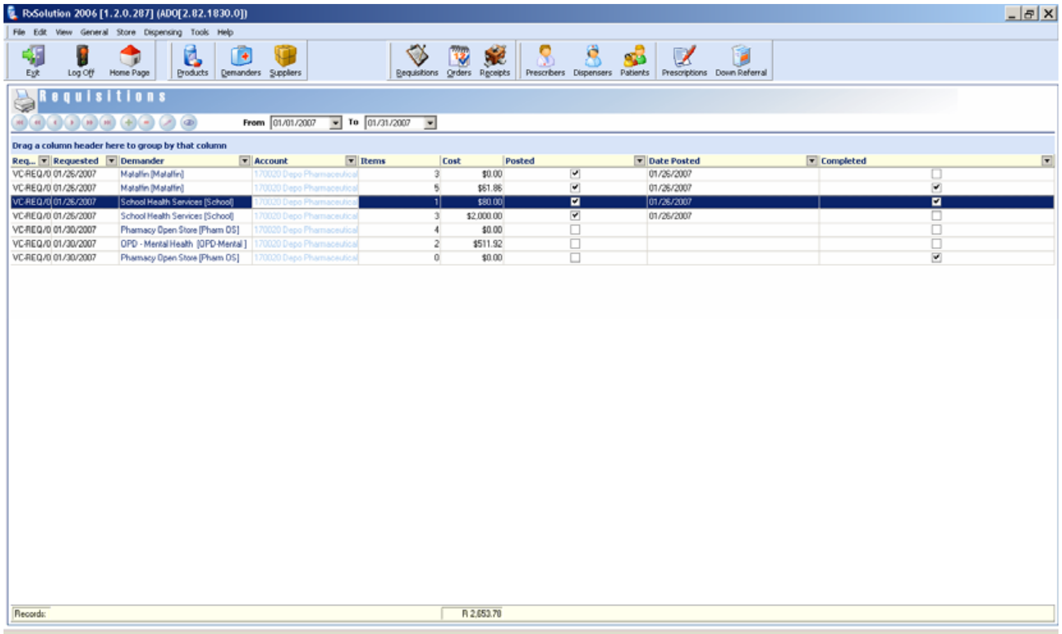
   Choose the **Print Selected Requisition** option. The preview screen will look like the one below, and you can follow the normal procedure to print a hard copy. Note: If a customized invoice has been set up, it will be printed instead of the standard report below.



How Do I View a List of My Requisitions?

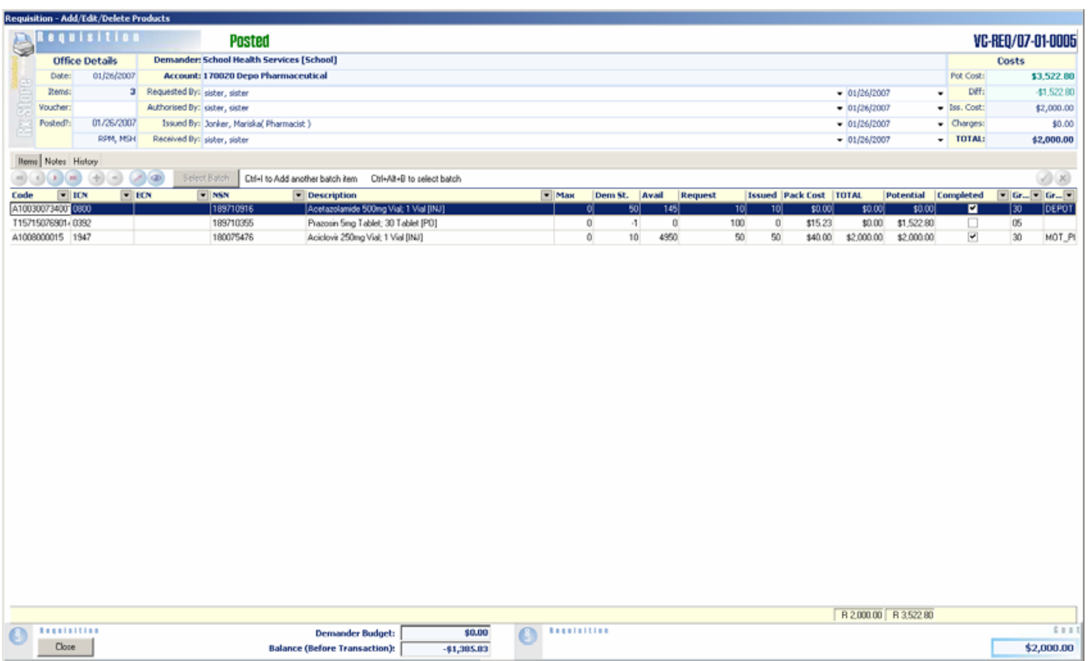
Click on the **Requisitions** option on the menu bar 

and the requisitions are listed.



How Do I Open an Existing Requisition?

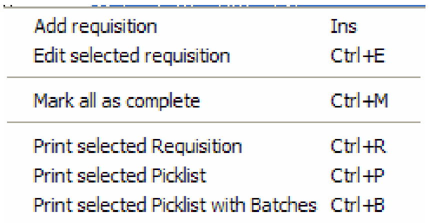
Double click on the requisition to be opened. The following screen appears—



How Do I Edit a Requisition?

1. Right click on the requisition to be edited.

2. Choose the appropriate option

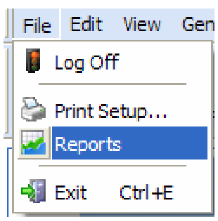


How Do I Print a List of Unposted Requisitions?

The list of unposted requisitions is a customized user report. To run it, do the following—

1. From the menu bar, select **File**.

2. Select **Reports**.



3. Select unposted requisitions as defined in the customized user report.

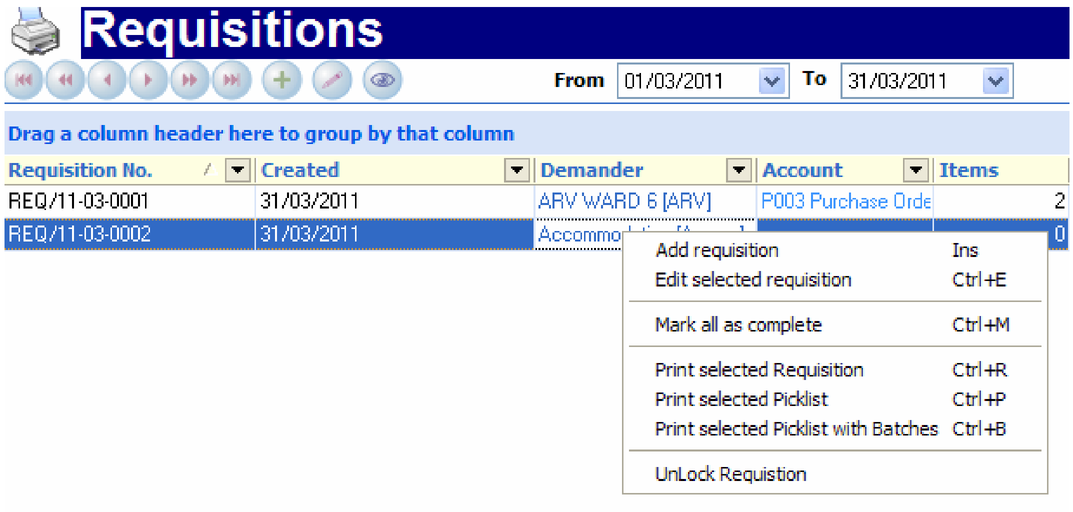
4. If the report cannot be located, request the report from your RxSolution support team.

How Do I Unlock a Requisition?

If a requisition has been exited illegally and no other person is entering items on the same requisition, the requisition will remain locked and un-editable. Follow this procedure to unlock the requisition—

1. In the Requisitions list, click on the locked requisition to highlight it.

2. Click on edit the current record icon .



3. Select the **Unlock Requisition** option.