Hybrent SOP

Version History

Date	Version	Updated By:
06/30/22	1.0	Solounge Y. Bowen

Credentials

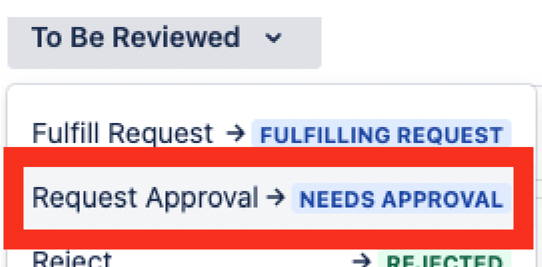
Signing In

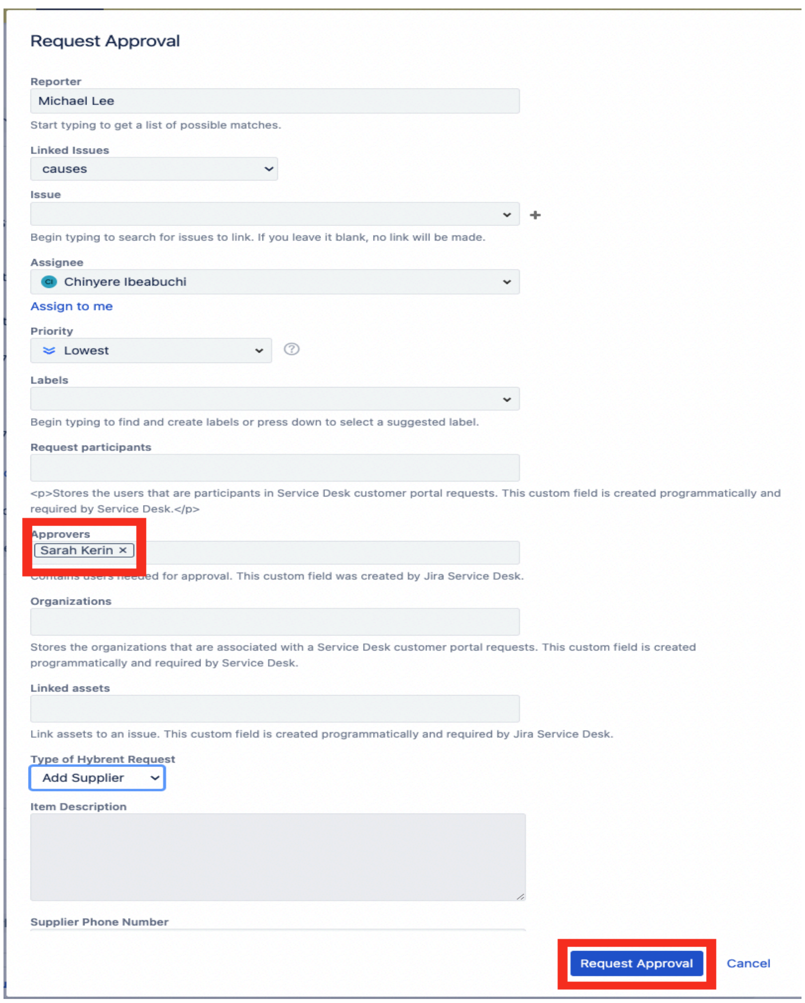
- If you have a Hybrent account created and this is your first time signing in, below are the needed.
    - Link to Hybrent : [Link]
    - Username: **first name initial + last name**
    - Password: **hybrent**
        - This should prompt you to change your password
    - GreenHouse
- Greenhouse Onboarding Site : [Link]

Facility

New Vendor Adds

- Before proceeding with adding the vendor into Hybrent please assign the ticket to yourself and change the status of the ticket to "***Needs Approval***" so that you can set Sarah Kerin as an approver





- Once you get the the approval you can proceed with adding into Hybrent
- For Vendor Adds, the Hybrent Team adds this for Kindbody
    - Contact: **Emma Knox**

- E-mail: emma@hybrent.com
- Typically send a weekly email to Emma asking if the newest set of suppliers added to the vendors list to be added into Hybrent
- This can take the Hybrent team apprx ~ **1wk**

- Currently KB and Hybrent team are using the Org Master file in the "***Vendors***" tab to keep track of all the listed vendors within Hybrent
- Anyone who would like to submit a request/ticket for a vendor add can use the Hybrent Form and answers all of the questions needed to fill out the Org Master file
- After entering the Org Master, upload the given W9 form & vendor form for the vendor and add it to the W9 Folder & Vendor Form Folder

Redirecting Vendor Add Tickets

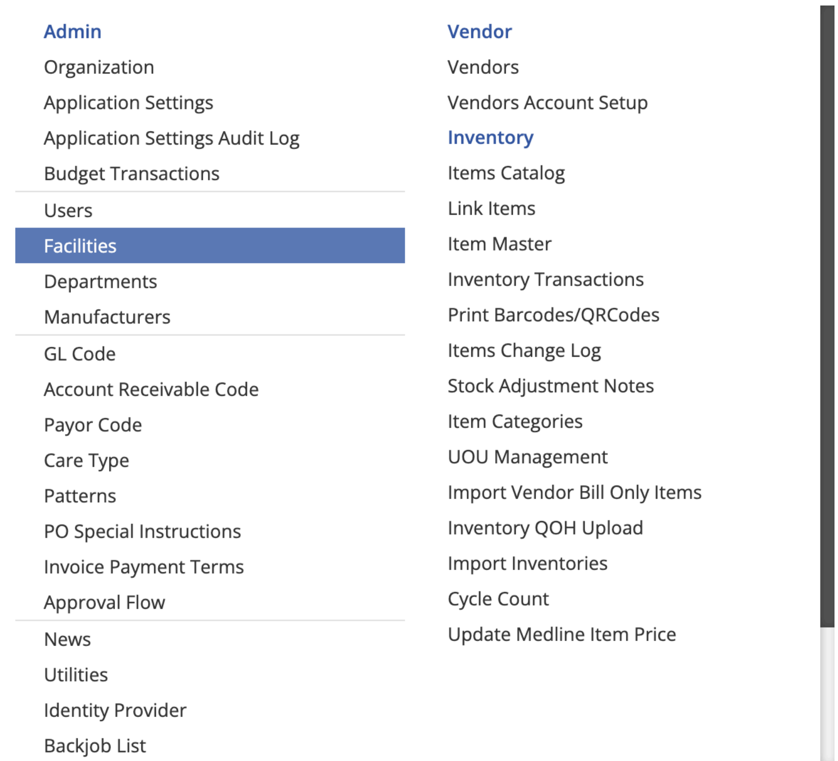
- In some instances, users will submit an "Add Supplier" ticket without attaching the required W9. If you ever experience this, here is the recommended workflow.
    1. Complete the steps above in "New Vendor Adds", and instead of closing the ticket reassign to (user name) will obtain the W-9 and Vendor Form, she will add it to the W-9 and Vendor Form Folders

Vendor Account SetUp

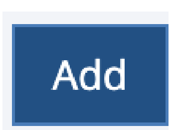
1. Click on to the "***Admin***" tab and choose the "***Vendors Account Setup***" button
2. Proceed with selecting and searching for the desired vendor
3. Use the search facility box to enter the facility and click enter.
4. If the "***Account Number***" is blank you can refer to the Vendor Account Number sheet to see if there is anything for the desired vendor.
5. Anything that is set to green on the sheet has already been added to Hybrent

New Facility Setup

1. Click on to the “***Admin***” tab and choose the “***Facilities***” button



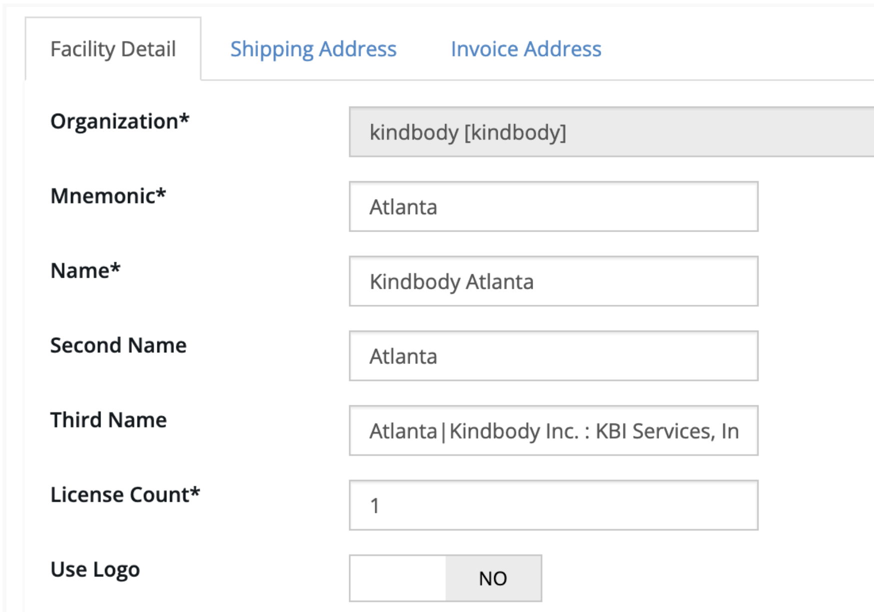
2. Click the “***Add*** ” button



Enter the required fields for the Facility Detail and the addresses

a. Mnemonic - typically the name of the location
b. Third Name: **Location |Kindbody Inc. : KBI Services, Inc.**
c. License Count- set to “ **1** “
d. Shipping Address - the new facility address

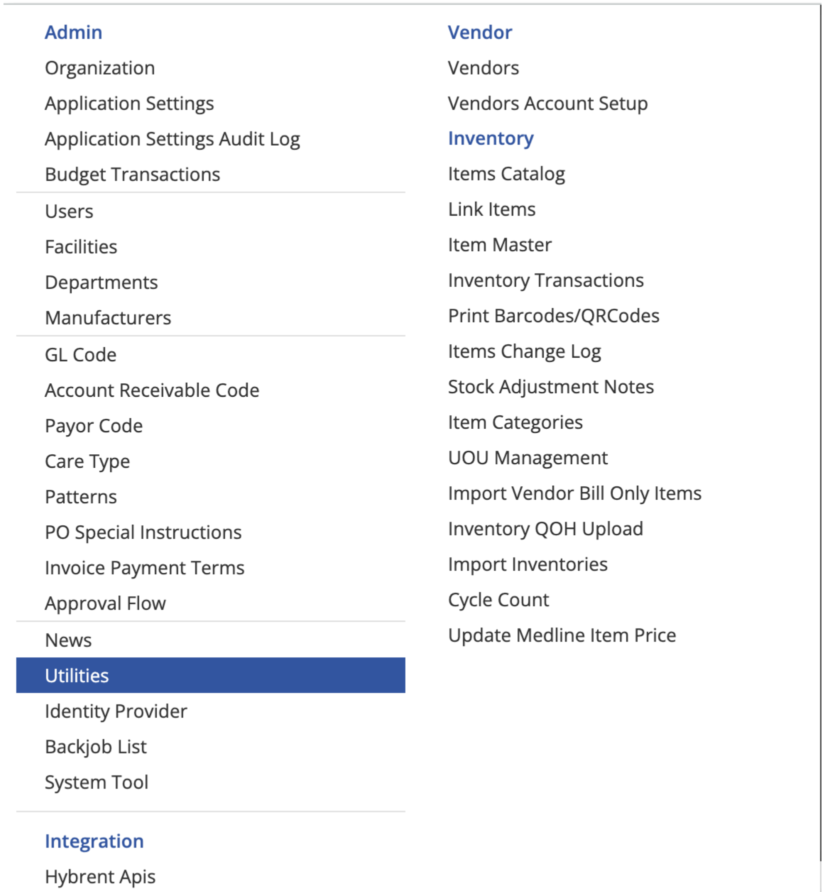
e. Invoice Address- **120 Fifth Avenue, Fifth Floor New York, NY 10011**



3. Click the "***Save*** " button

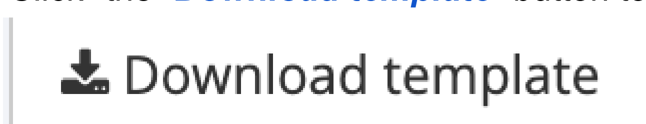
Import Bulk (Facilities, Dept, User, Patient)

1. Click on to the "***Admin***" tab and choose the "***Utilities***" button



2. Select the “***Go***” button under “Import”

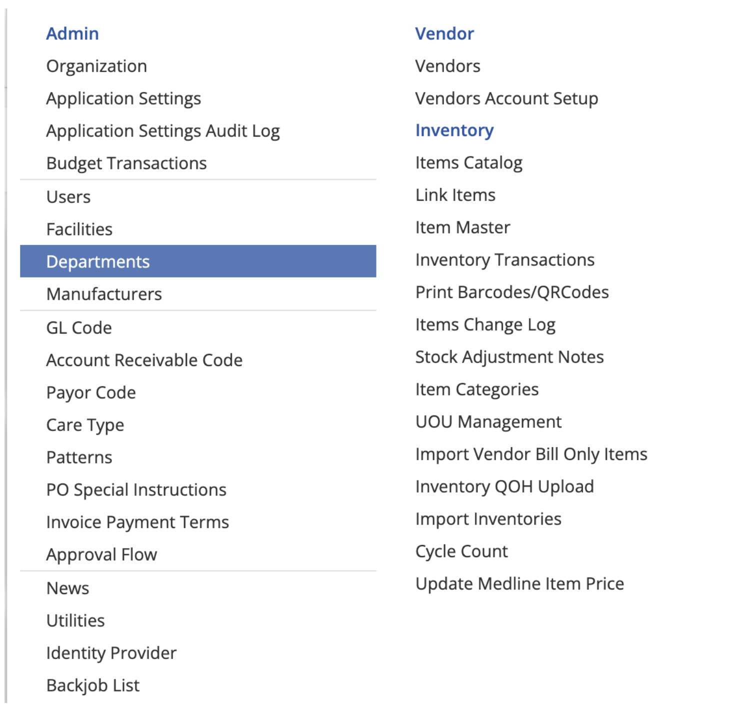
3. Click “the “***Download template***” button to receive the file



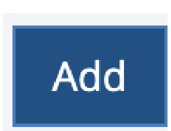
4. Fill in the template, click “**Choose File**” , and upload the file into Hybrent

New Department Setup

5. Click on to the “***Admin***” tab and choose the “***Departments***” button

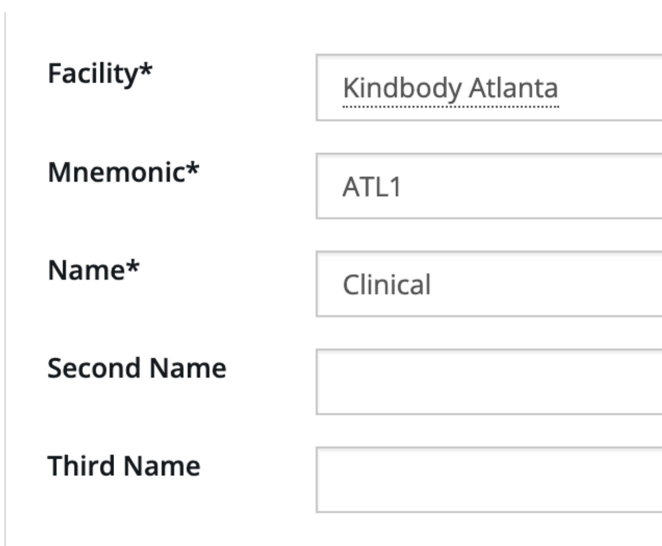


6. Click the “***Add*** ” button



7. Enter the required fields for the window

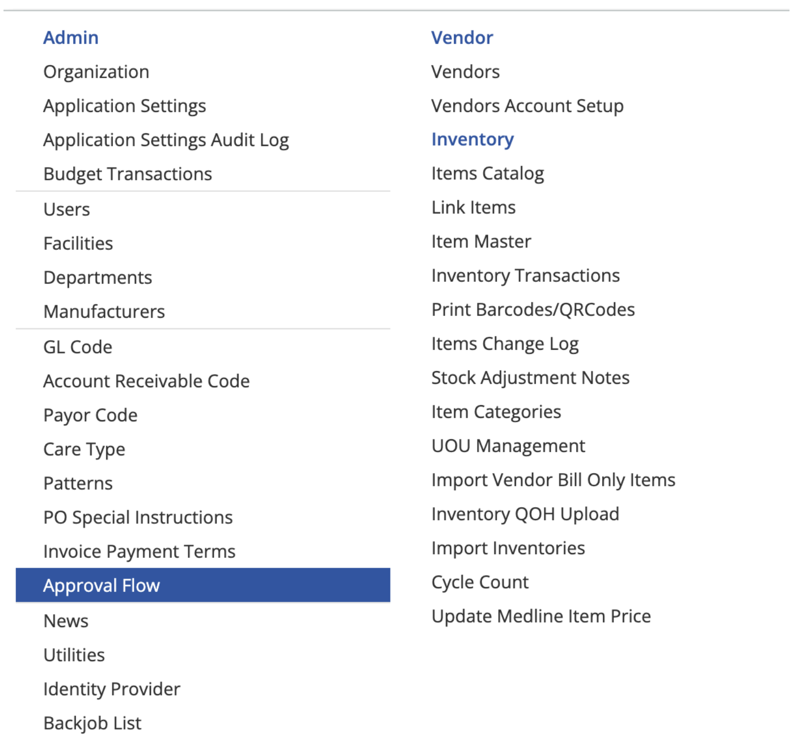
a. Mnemonic - Typically the first two or three letters of the location name followed by a #
   i. **Billing= 15**
   ii. **Clinical = 1**
   iii. **Lab = 2**
   iv. **Corporate = 5**
   v. **Customer Experience = 7**
   vi. **Engineering/Tech = 3**
   vii. **Enterprise Sales = 9**
   viii. **Facilities/Construction = 4**
   ix. **Finance = 10**
   x. **Marketing = 8**
   xi. **People = 6**
   xii. **Practice Ops = 13**
   xiii. **Product = 11**



8. Click the "***Save*** " button

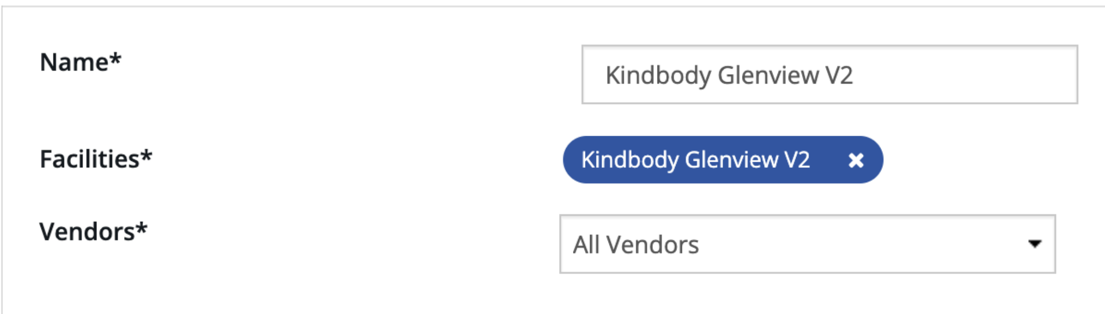
New Facility Approval Workflow Setup

Click on to the "***Admin***" tab and choose the "***Approval Flow***" button



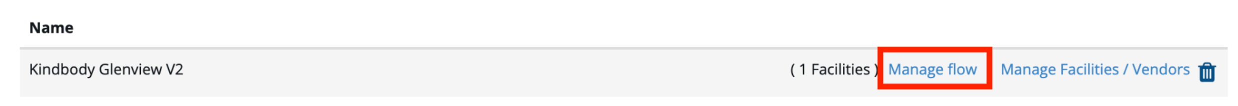
Click the "***Add*** " button

Enter the name of the new facility followed by linking the Facility



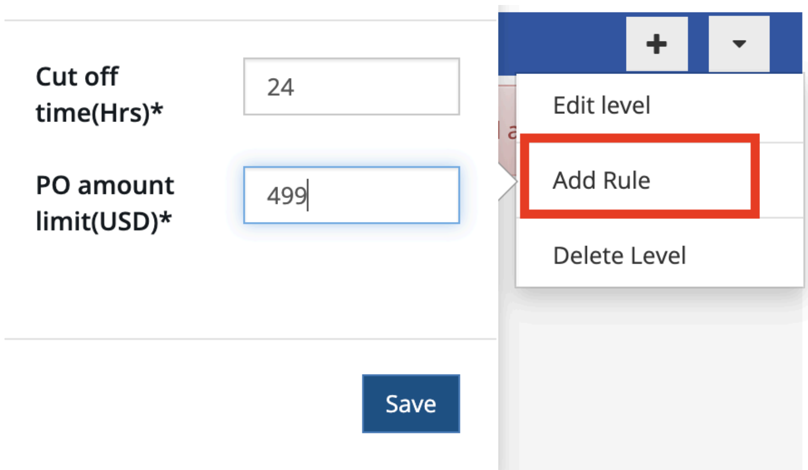
Click the "***Save*** " button

Search and select the "***Manage Flow***" button for newly added facility



Click the "***Add Level*** " button to set up the structure for this facility starting off with Level 1

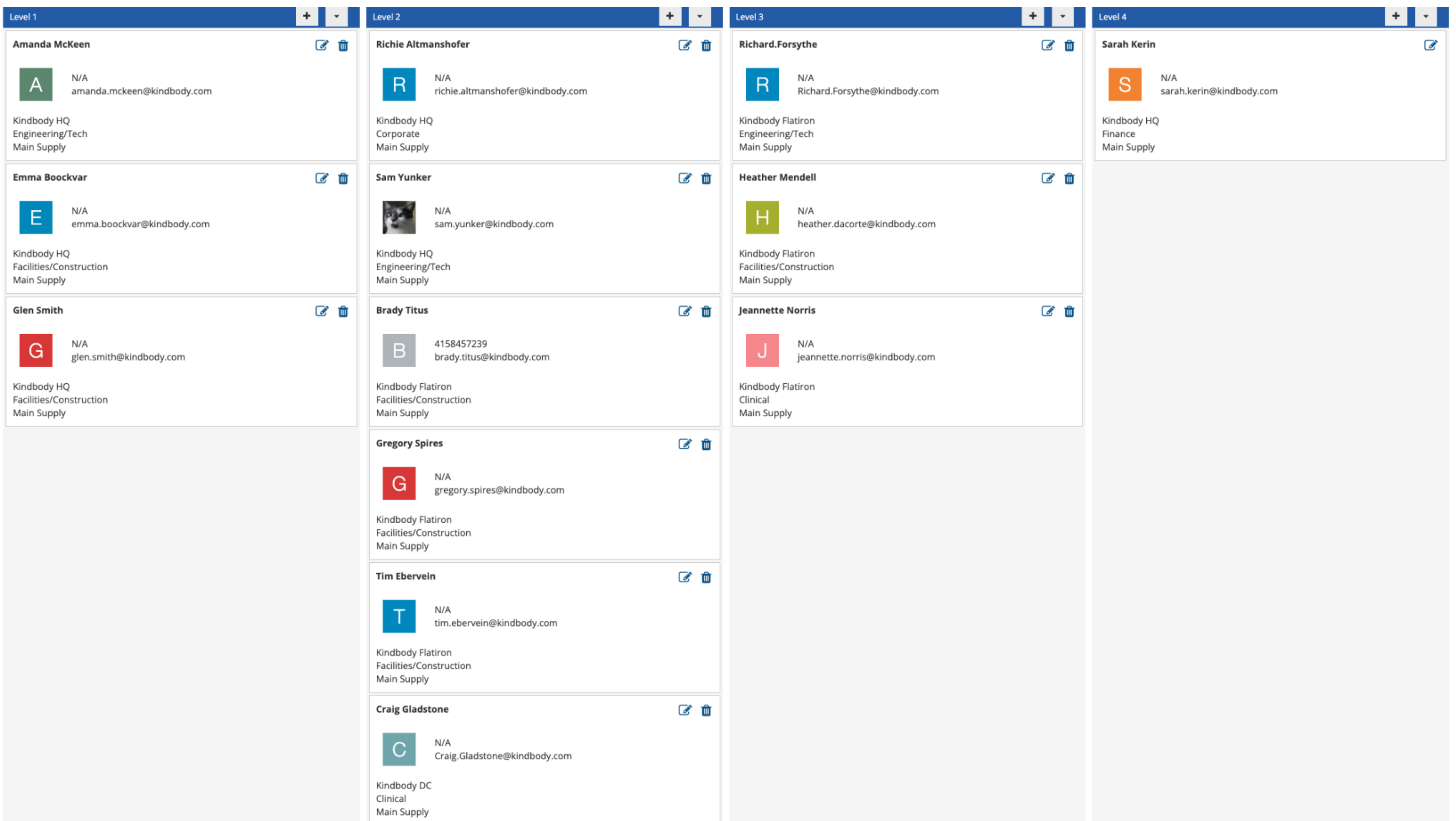
Once you add users to their correct level, click the caret dropdown and select "***Add Rule***" to add a limit to PO amounts. Always set the Cutoff time to **24 hrs**



- **When setting up the approval flow, make sure that there is a person for the desired department in each level to avoid any stuck PO's**
  - **Use this [Approval Workflow Sheet] as a reference**

- **When creating a new workflow , make sure to add the following people for initial set up (screenshot added below)**
  - **Finance**
    - Sarah Kerin
  - **Facilities/Construction**
    - Heather Mendell
    - Tim Ebervein
    - Brady Titus
    - Gregory Spires
  - **Clinical**
    - Jeannette Norris
    - Richie Altmanshofer
    - Craig Gladstone
  - **Engineering/Tech**
    - Amanda Mckeen
    - Sam Yunker

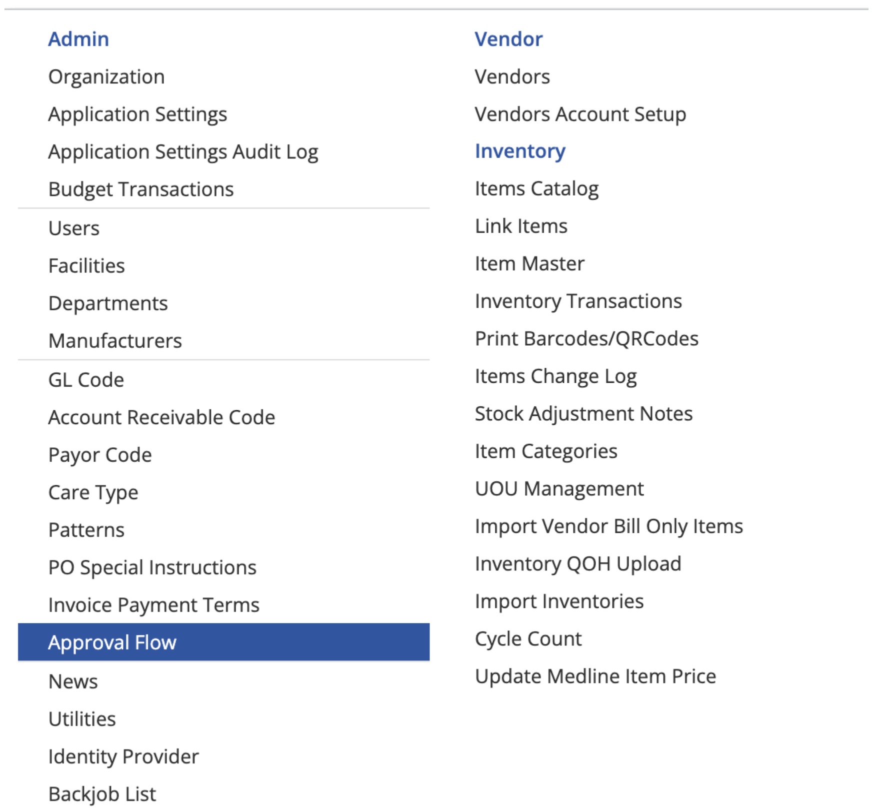
- Moises Castillo
- Richard Forsythe



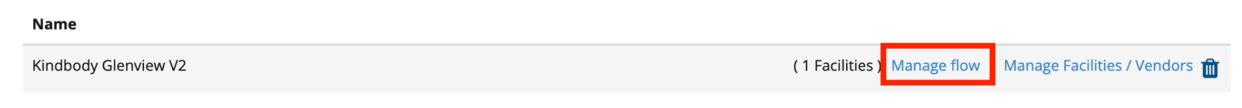
Users

User Approval Workflow

1. Click on to the "***Admin***" tab and choose the "***Approval Flow***" button



2. Search and select the "***Manage Flow***" button for desired facility that you would like to add the user to



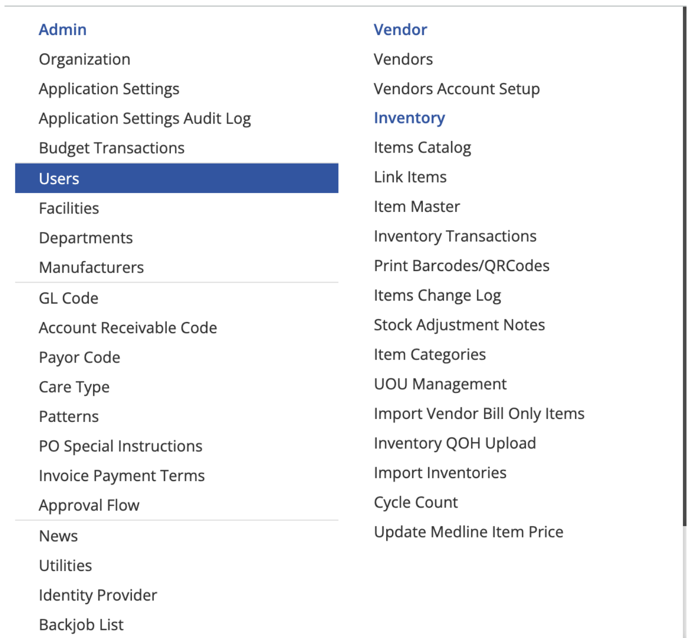
3. Select the "**+** " button in the correct level the user would be placed in

4. Enter the required fields and click the "***Save***" button

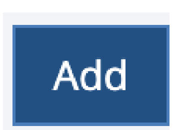
- **When setting up the approval flow, make sure that there is a person for the desired department in each level to avoid any stuck PO's**
- **If you are unsure which Dept this person would belong to please this Document for reference**

User Adds

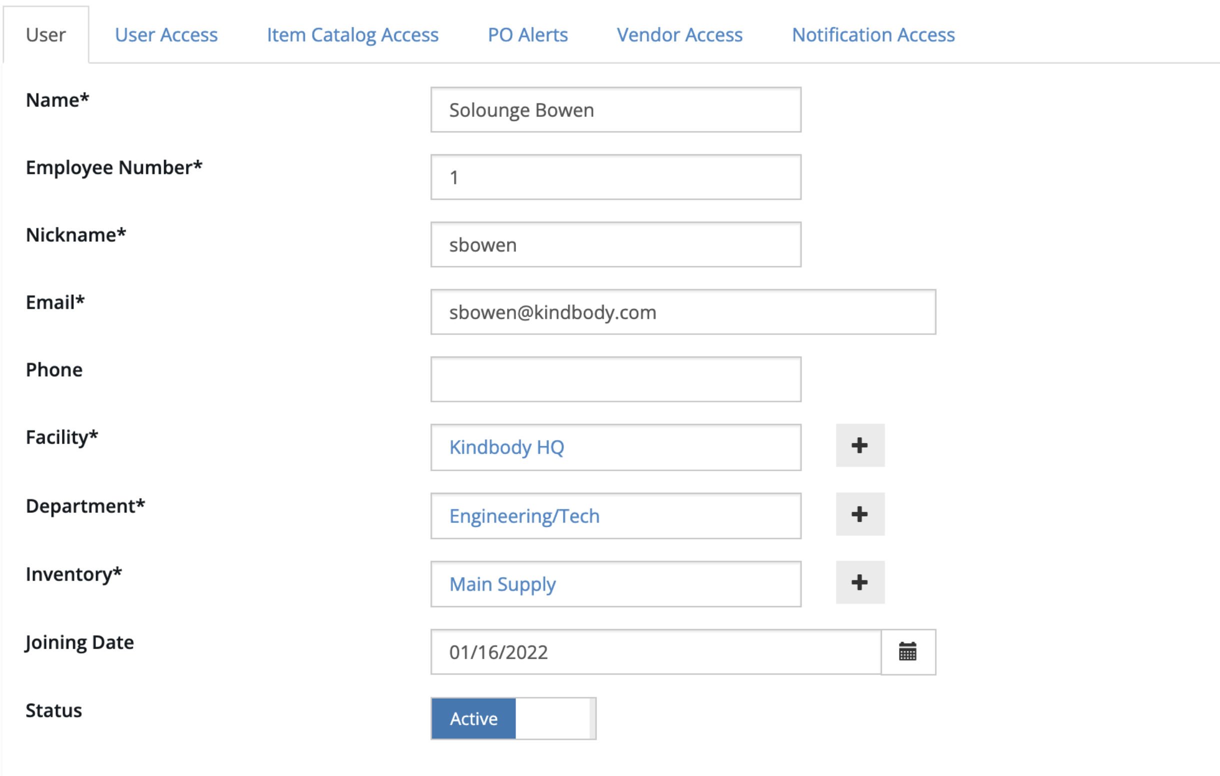
1. Click on to the "***Admin***" tab and choose the "***Users***" button



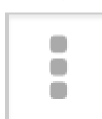
2. Click the "***Add***" button



3. Enter in the required fields in the "***User***" tab



4. Click the “***Vendors Access***” tab and click onto the three dot icon following by “***Select All*** ” button, this will cause all the vendors to appear



5. Click the "***Notification Access***" tab and adjust accordingly

User | User Access | Item Catalog Access | PO Alerts | Vendor Access | Notification Access

Event	Mobile Push	Email Notification	Web Notification
Purchase Order Approval	On	On	On
Pending Approval	On	On	On
Purchase Order Approved	On	On	On
Purchase Order Confirmation	On	On	On
Purchase Order Shipped	On	Off	On
Purchase Order Invoice	On	Off	On
QOH Less Than Par Level	On	Off	On
Template Schedule Create PO	On	Off	On
Purchase Order Rejected	On	Off	On
Stock Transfer Initiated	On	Off	On
Stock Transfer Updated	On	Off	On
Stock Transfer Cancelled	On	Off	On
Stock Transfer Received	On	Off	On
Stock Transfer Rejected	On	Off	On
Add News	On	Off	On
Invoice Threshold	On	Off	On

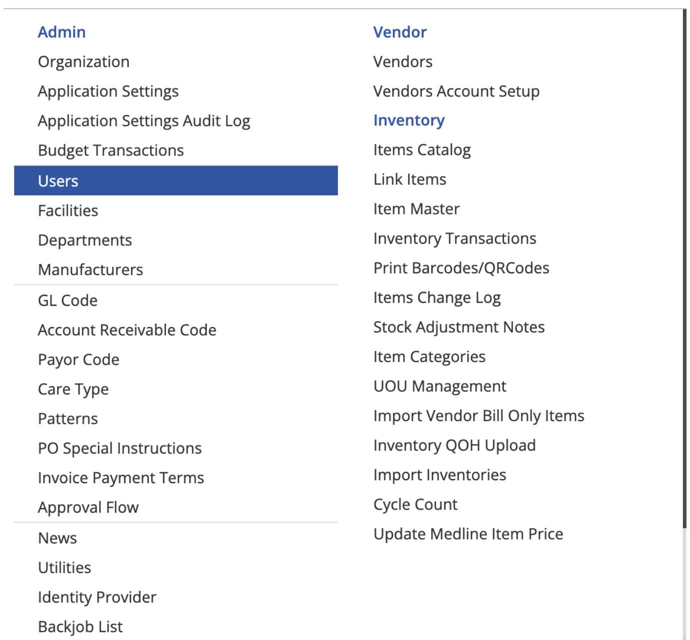
6. Click the "***Save***" button

7. When you create a user's new account , a pop up window will appear asking to update facility access and you can click "**Yes**"

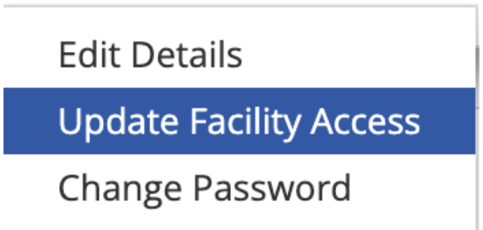
- Leave the following fields as is:
  - **User Access**
  - **Item Catalog Access**
  - **PO Alerts**

User Facility Access

1. Click on to the "***Admin***" tab and choose the "***Users***" button



2. Search for the desired user and click the caret dropdown and select "**Update Facility Access**"



3. Click the "***Assign Access***" or "***Remove Access***" button

4. Click the three dots to then select the desired facility you wish to update.

5. If assigning access the set up should look like this.

SBC
SoloBo Consults
WEB & PROJECT MANAGMENT

Vios Aurora — [ ] Select all

Orders [x]
- [x] Receive PO
- [ ] Edit PO
- [ ] Delete PO
- [x] Can See Price
- [x] Can Change Receive Date

Shop [x]
- [ ] **Punchout**

Manage Inventory [x]
- [x] Scanout
- [x] Inventory Cycle Count
- [x] Inventory Physical Count Worksheet
- [ ] Inventory Transfer
- [ ] Add Item
- [ ] Edit Item
- [ ] Delete Item
- [x] Scan In
- [ ] Update Medline Item

Reports [x]
- [x] Activity Report
- [x] Top Items Purchased
- [ ] Current Cost By Account
- [ ] Current Items By Status
- [ ] Monthly Value Of Purchase Order By Ship to Location
- [ ] Monthly Variance by Ship to Location
- [ ] Cost By GL
- [ ] Distributor Compliance
- [ ] Price Change Report
- [ ] Inventory Adjustment Report
- [x] Items Ordered Report
- [ ] Top Vendors Report
- [ ] Contract Compliance Report
- [ ] Price Discrepancy Report
- [ ] Item Expiring Report
- [ ] Case Costing Report
- [ ] PO History Report
- [ ] Purchase Order Log
- [ ] Implant Log
- [ ] Real Time Inventory Report
- [ ] Purchase Report
- [ ] Spend Per Vendor Report
- [ ] Items Below Par Level Report
- [ ] Backordered Or Rejected Items Report
- [ ] Items Invoice Status Report
- [ ] Items Received Report
- [ ] PO Receive Status Report
- [ ] Invoice Status Report
- [ ] Scanned Out Items Report
- [ ] Freehand Items Report
- [ ] Project Report
- [ ] Standard Billing Report
- [ ] Comprehensive Inventory Transaction report
- [ ] Usage report

PO Shipment Notification [x]

PO Invoice Notification [ ]

Order Template [x]
- [x] Add Order Template
- [x] Edit Order Template
- [ ] Delete Order Template
- [x] Use Order Template

Invoice [ ]

Shipments [x]

Service PO [x]
- [x] Add Item
- [x] Edit Item

Kit Template [ ]

Scan Out Template [ ]

Medline Consignment Count [ ]

<u>Purchase Orders</u>

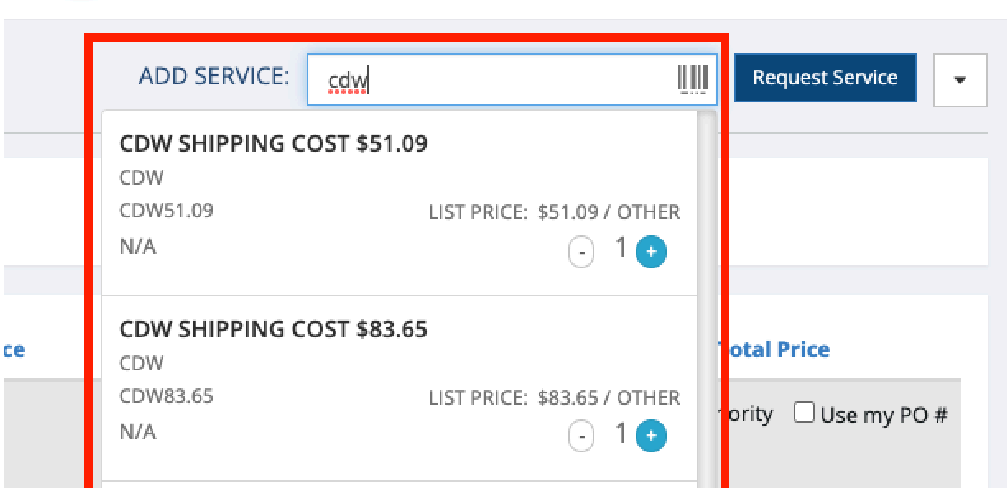
Creating a P.O.

1. Click onto “ **Shop**”
2. Confirm that you are shopping for the correct facility
3. Begin searching for the desired vendor
4. Use the search field to add items into your cart
5. Once all of items are in your cart you can proceed to “**Generate PO**”

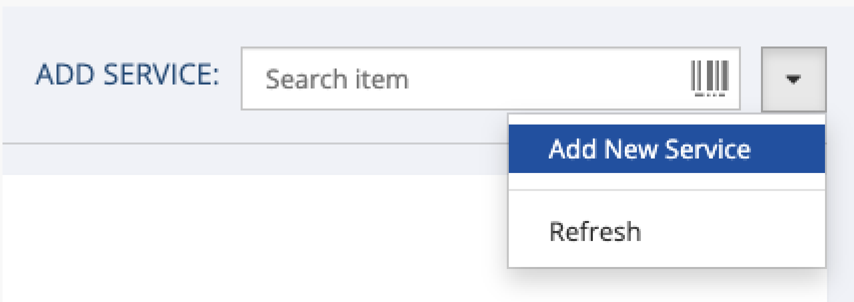
Creating a Service P.O.’s

1. Click into “**Request Service**”

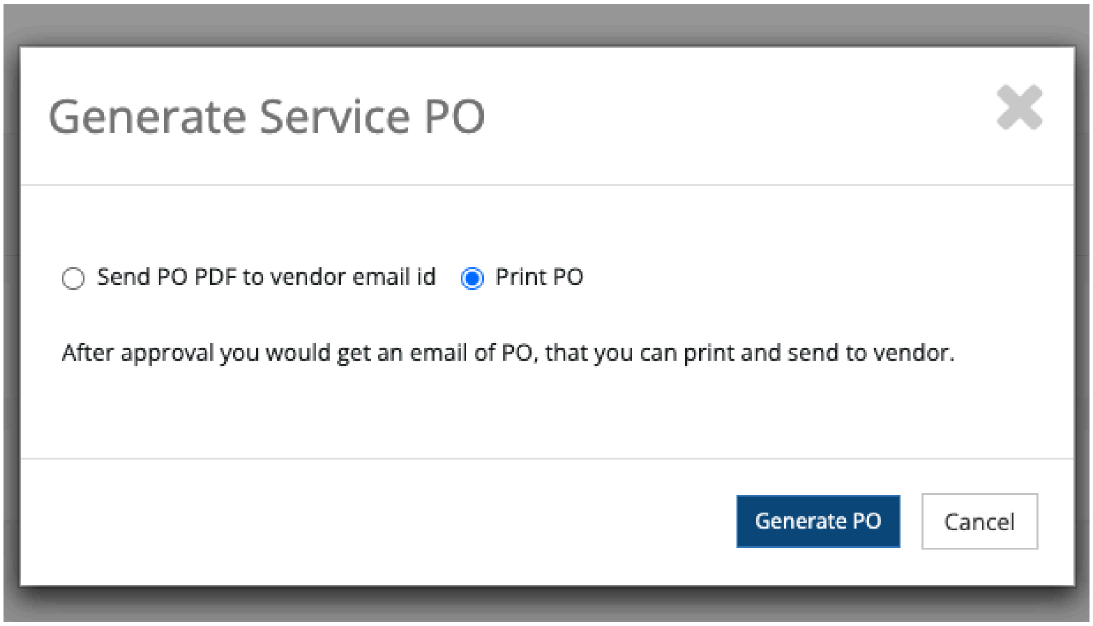
2. Click the “**Vendors**” button and select the desired vendor
3. Begin searching for the item in the “**Add Service**” search field.



4. If the item is not there, then you can click the mini caret next to the search field to "Add New Service"



5. From there you'd insert the following into the window:
   - Description Name
   - SKU #
   - The UOM is typically “EA”
   - Duration: Is set for one time if that is the frequency
   - Price '
6. Once you've added all of the items needed within the PO, you can click “**Request Service**” then the a window for generating a PO will appear and from that window choose “**Print PO**” followed by clicking “**Generate PO**”. At this point you'd be able to get the PO number to send to AP



Receive Only P.O.s

6. Click onto “ **Shop**”
7. Confirm that you are shopping for the correct facility
8. Begin searching for the desired vendor
9. Use the search field to add items into your cart
10. Once all of the items have been added, click the “**Receive Only** “ checkbox

11. Proceed to “**Generate PO**”

Fixing Unapproved/ Stuck P.O.'s

1. Sometimes some P.O.'s can get in a "stuck" state due to the following reasons:
    a. The person who submitted the P.O. is not placed in the facility's approval workflow
    b. The person is not set for the correct department in the approval workflow and it needs to be updated
    c. There may not be anyone in the same department and in each level to approve that person's P.O.
2. Once this has been resolved, the should go into the next process immediately.

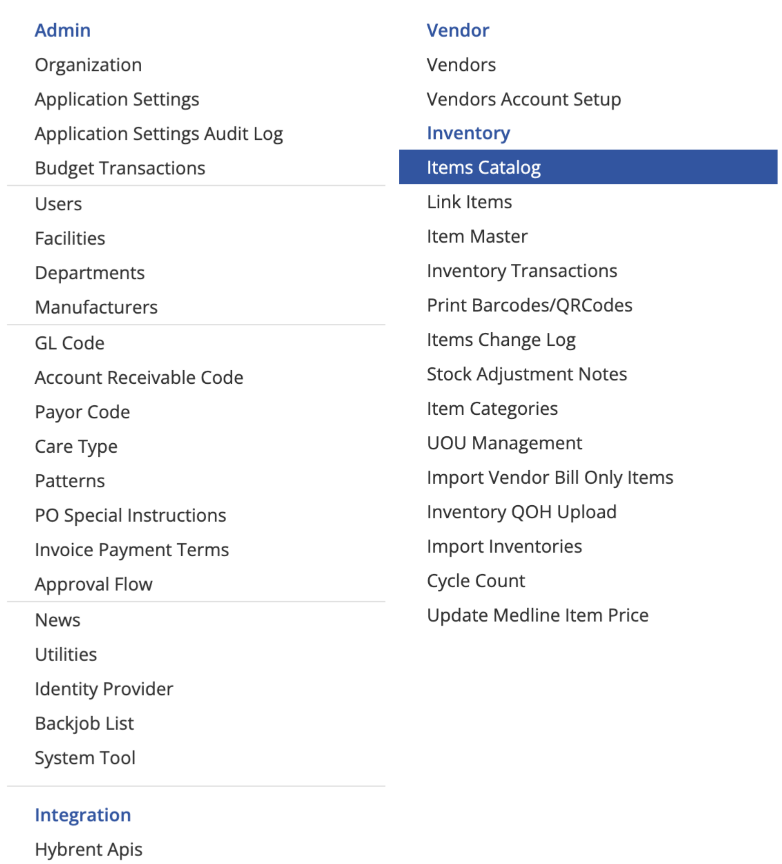
To avoid any stuck PO's refer to User Approval Workflow

Items

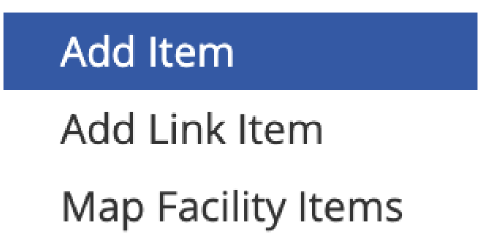
New Item Adds

Regular

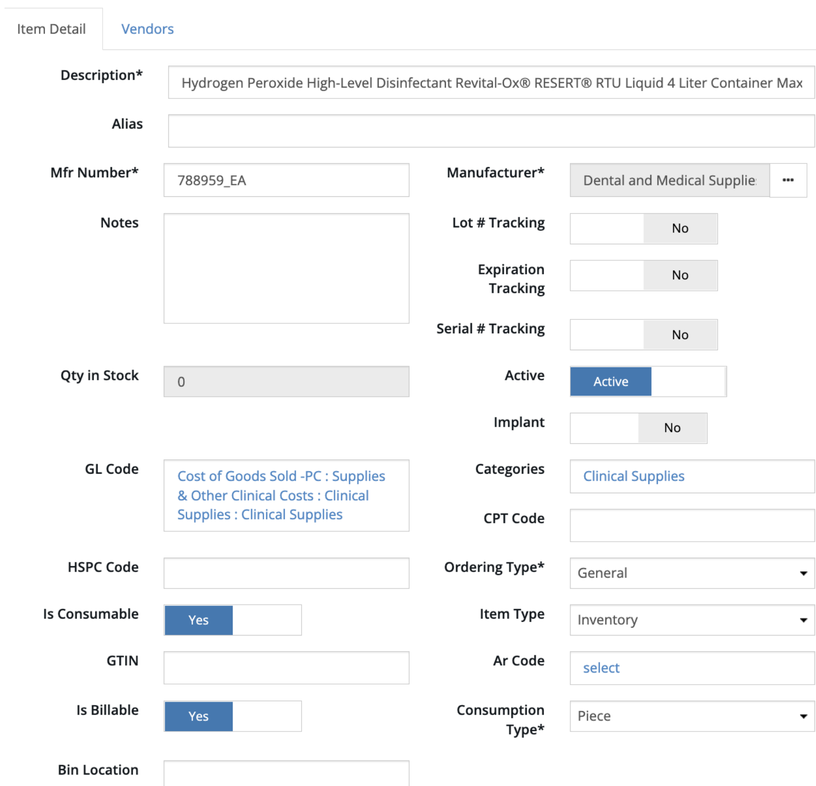
3. Click on to the "***Admin***" tab and choose the "***Items Catalog***" button



4. Click on the caret dropdown and select "***Add Item***" button

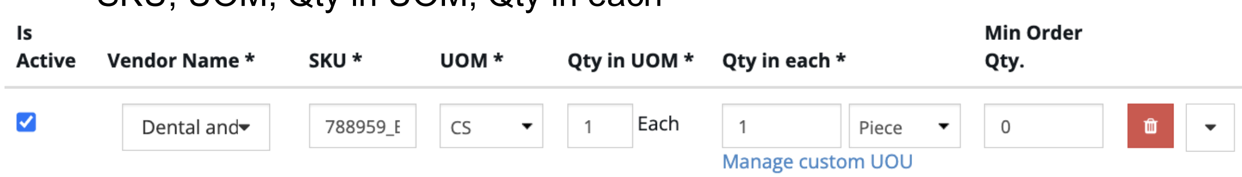


5. Enter in the following fields while in the "***Item Detail*** " tab: Description, Mfr Number, Categories, GL Code, Consumption Type



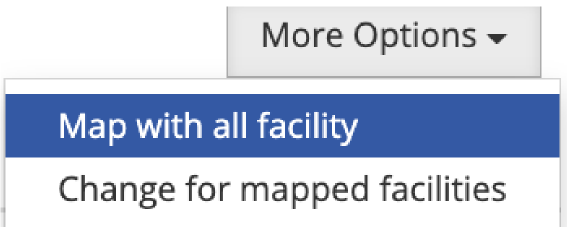
6. Click into the "***Vendors***" tab and click "***Add Vendor***" button

7. Enter in the following fields while in the "***Vendors***" tab: Vendor Name, SKU, UOM, Qty in UOM, Qty in each

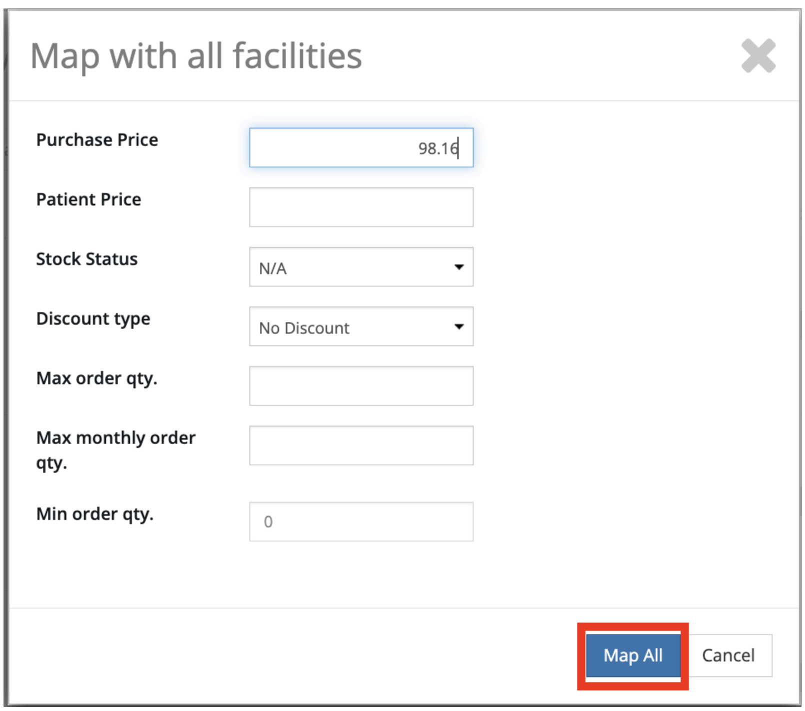


8. Click the "***Save***" button and a popup will appear asking if you would like to map the prices to other facilities. Select "***Yes***" button

9. Click on the “***More Options***” dropdown and select “***Map with all facility”*** button



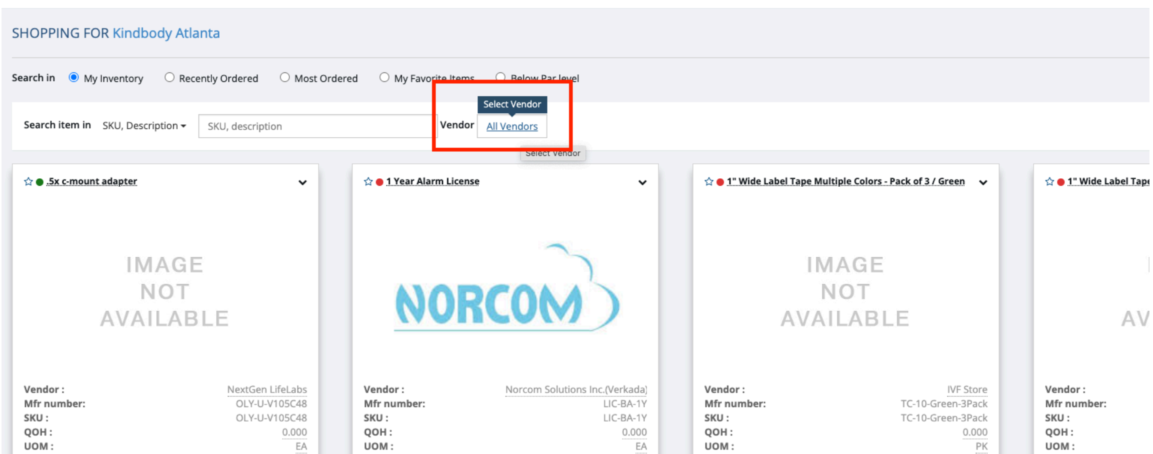
10. Enter the Purchase Price and click the “***Map All*** ” button



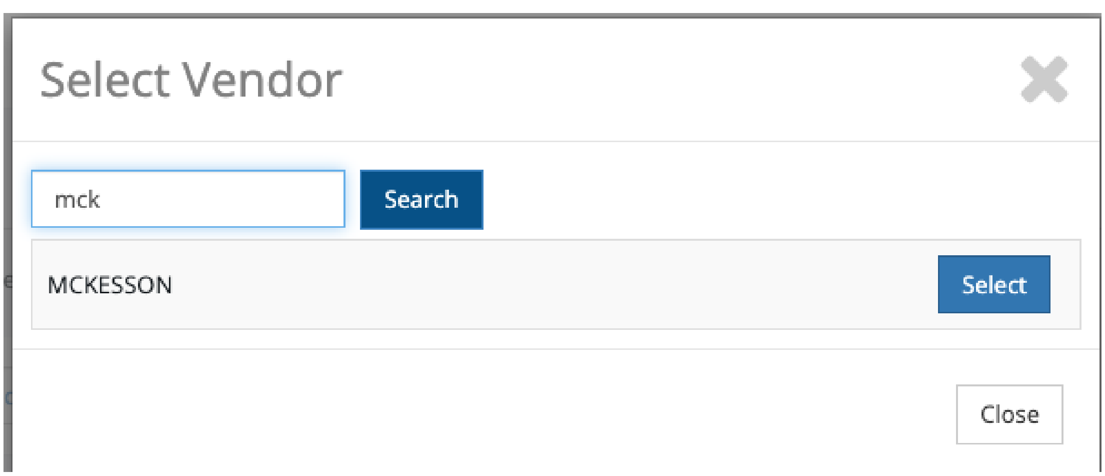
Punchout

1. Click on to the "***Shop***" tab and choose the location you would like to add the item to

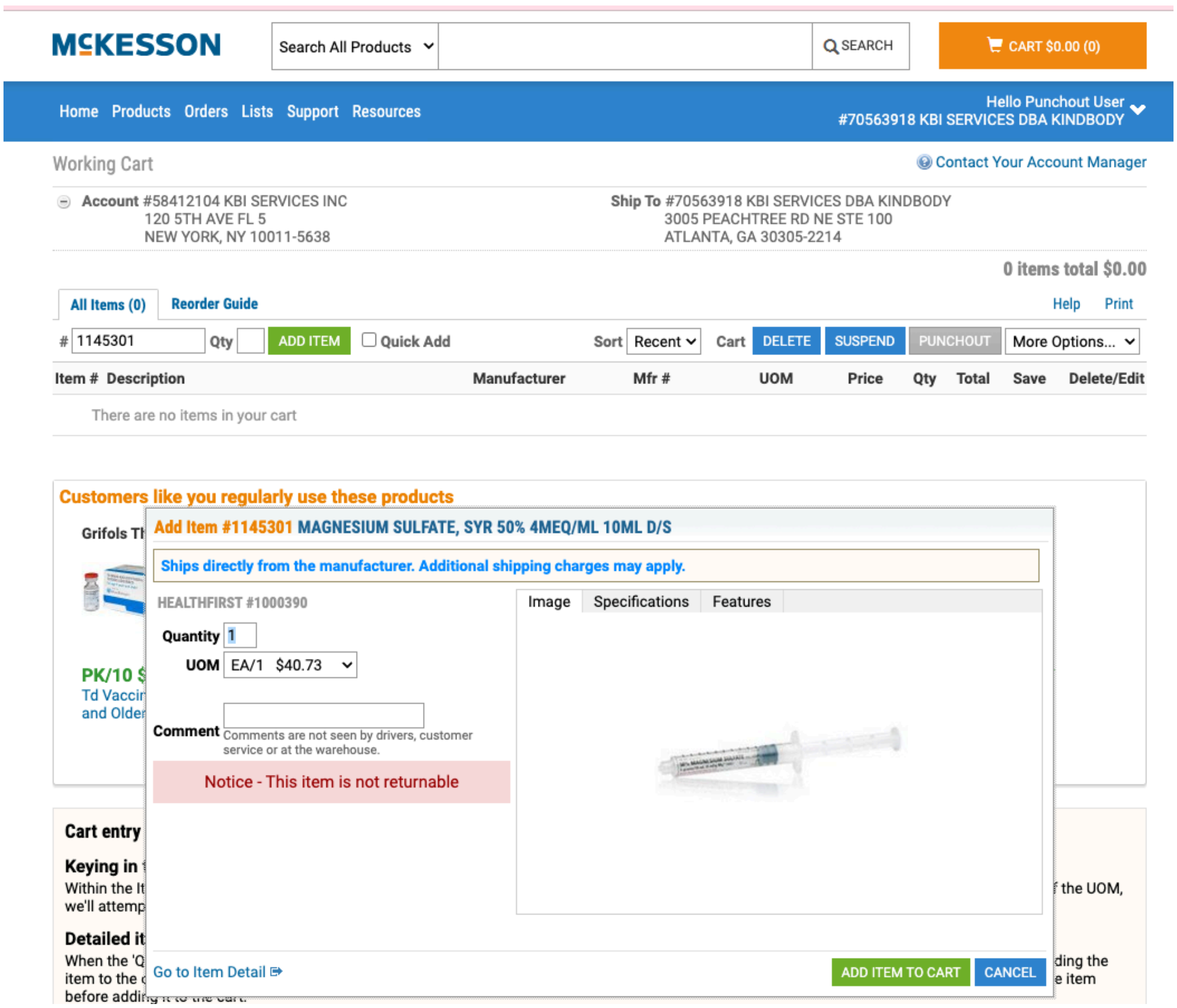
2. Click the "***All Vendors***" button and select the desired vendor.



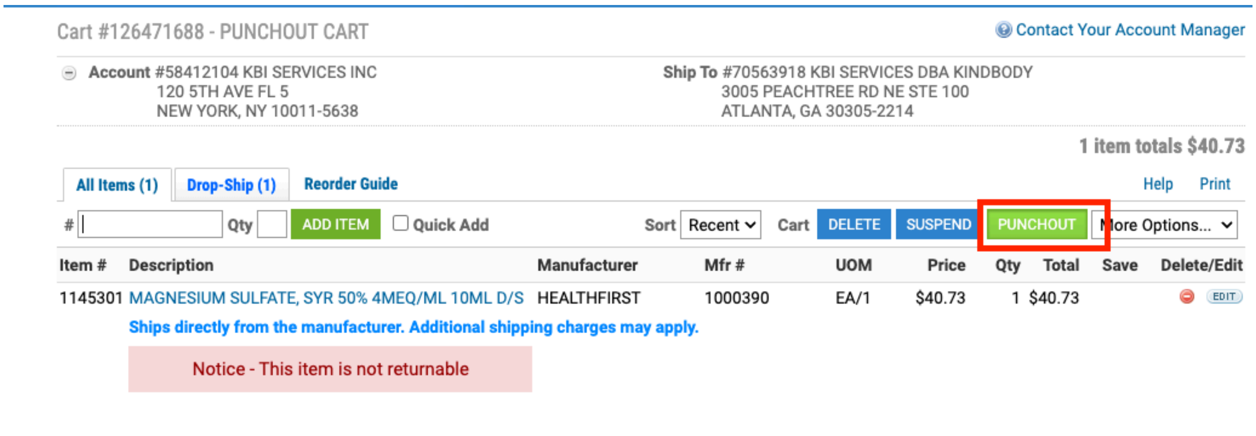
3. Once you have selected the vendor , it will take you back to the original screen. There you would click the "***Search on Vendor Site***" button and it will redirect the screen

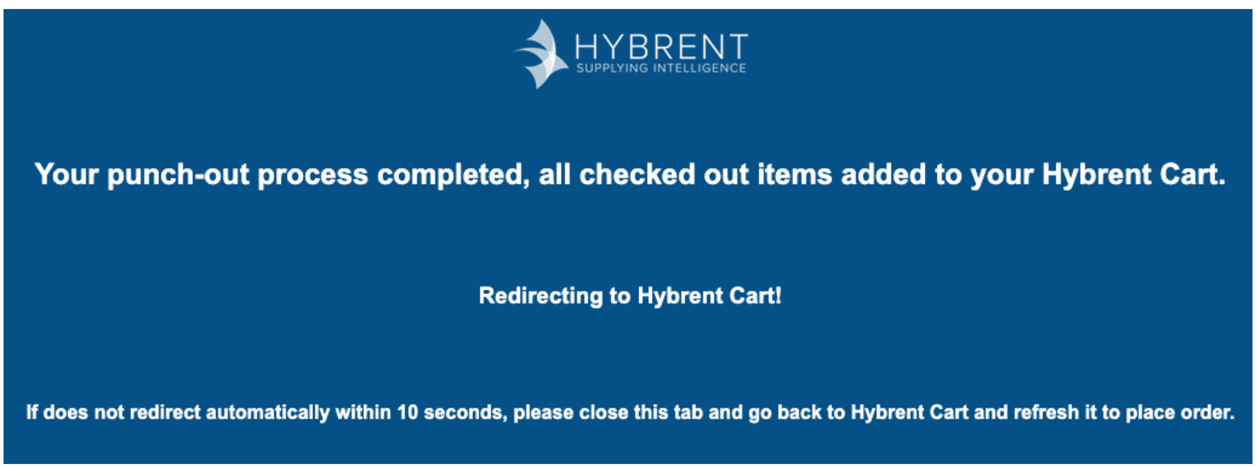


4. While you are on the vendor site you can search for the product and add it to the cart



5. Once you have all of the items needed within your cart, you can proceed to Punch Out. Your screen will be redirected with the items and its information preloaded into Hybrent





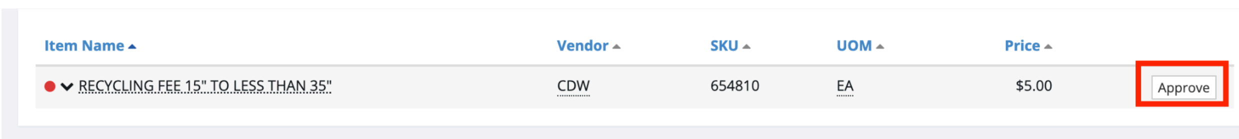
Bulk Items

- For Bulk Item Adds, the Hybrent Team adds this in for Kindbody
    - Contact: **Emma Knox**
    - E-mail: emma@hybrent.com
    - This can take the Hybrent team apprx ~ **1wk**
- Currently KB and Hybrent team are using the Item Master as a template
- Once completed, you can send a file to Emma of the items needed to be added

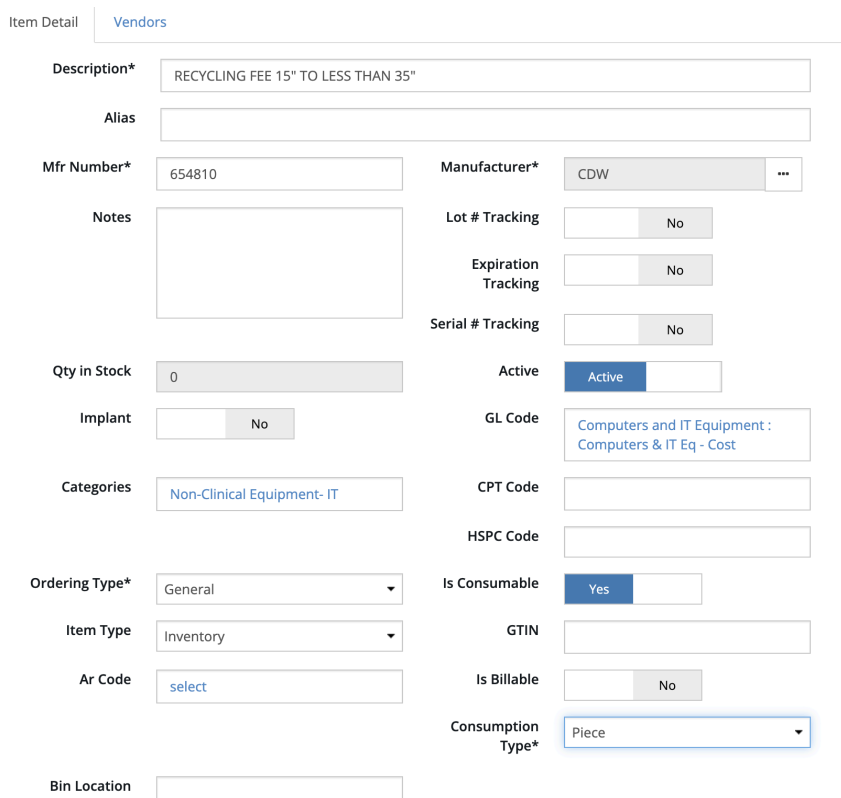
Item Approval

1. Click onto the "***Approve Items***" tab to see the list of items needing to be approved

2. Click the "***Approve***" button next to the item



3. Enter in the following fields while in the "***Item Detail*** " tab: Description, Mfr Number, Categories, GL Code, Consumption Type

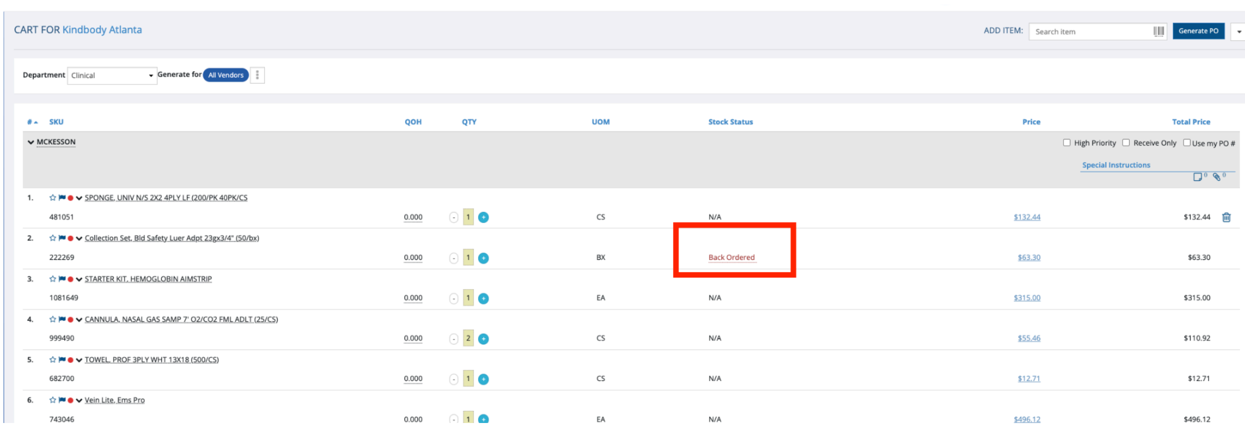


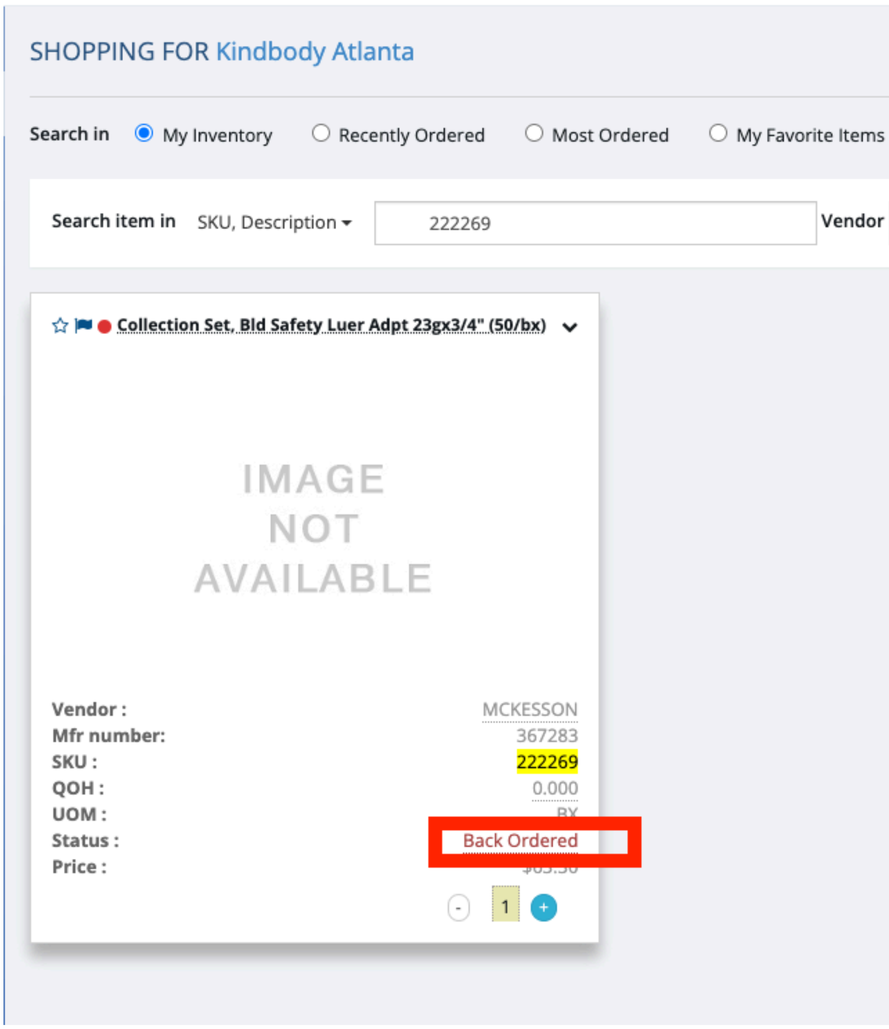
4. Click the "***Save***" button the item has now been approved

Backordered Items

If you are unsure on how to distinguish if an item is Backordered you can consider the following:

- For Manual Items:
  - Possibly have to contact the vendor for confirmation If the status of the items appears as "N/A" , contacting the vendor's representative for further confirmation would be recommended
- For Punchout items:
- When you go into "Shop" and search for the item the "Status" will let you know
- When you proceed with an item in a cart it'll show a red font for the Backordered





Mapping Facility/ Update Prices

1. Click on to the "***Admin***" tab and choose the "***Items Catalog***" button

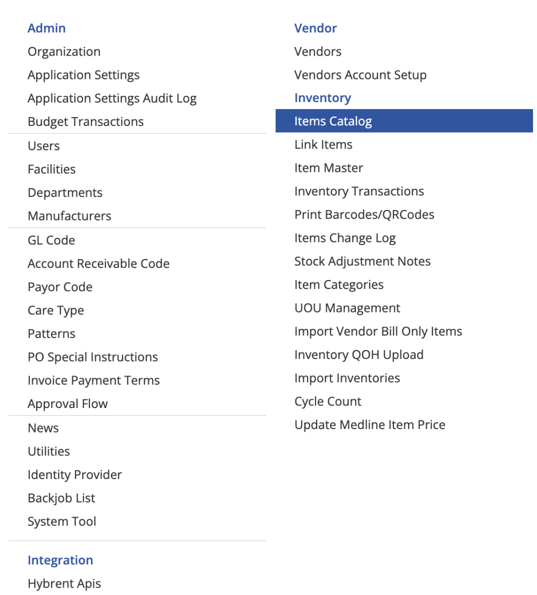
2. Search for the desired item followed by selecting the "***Map Facility/ Update Price***" button
3. Click on the "***More Options***" dropdown and select "***Map with all facility"*** button
4. Enter the Purchase Price and click the "***Map All*** " button

Map Facility Items With Other Facilities

1. Click on to the "***Admin***" tab and choose the "***Utilities***" button
2. Click "**Go**" under "***Sync/Map items from one facility to other facilities.*** "
3. Select the "From Facility" and the "To Facility" and click "***Map*** "

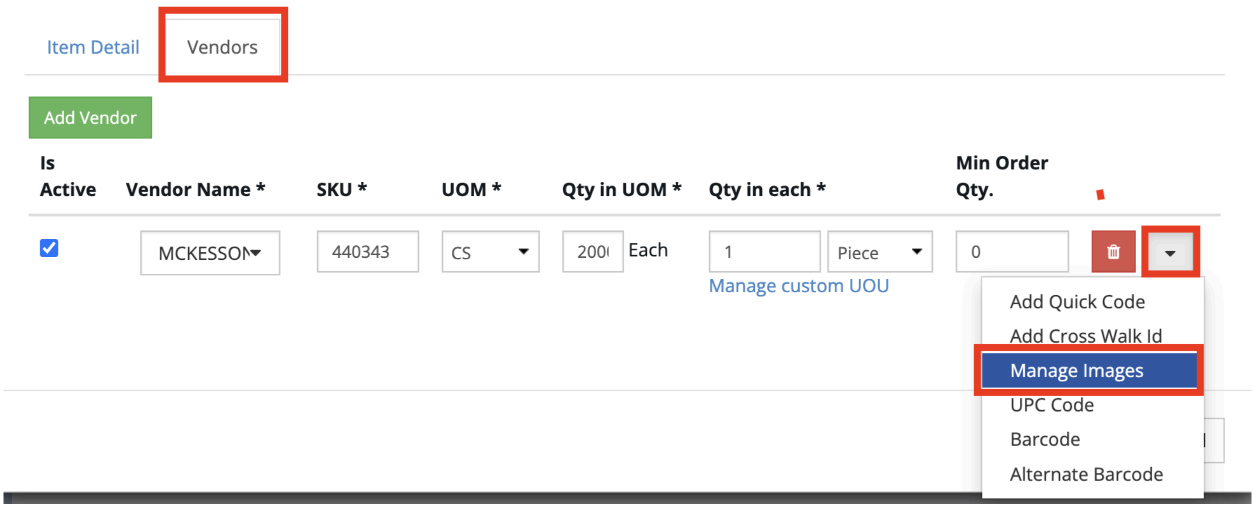
Adding An Image to an Item

1. Click on to the "***Admin***" tab and choose the "***Items Catalog***" button

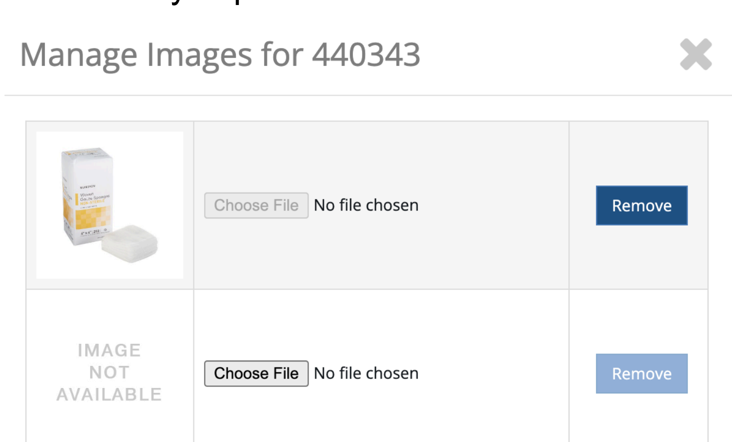


2. Search for the desired item followed by selecting the "***Edit Item***" button

3. Click on to the "***Vendors***" tab followed by the the caret next to the item and choose "***Manage Images***".



4. You can select the file you which to upload and once it loads, You successfully imported.



FAQ’s

- **“ I am trying to purchase these items from the vendor and I am getting a mapped error. How do I fix this?”**
    - *Use the Vendors Account Number file for reference when mapping.*
    - *In the “ **Vendors Account Setup**” tab search for the vendor and facility name that the user is experiencing issues with and enter the Account Number. Click “**Save**”*
- **“This item is no longer available with this vendor, can you please remove from Hybrent?”**
    - *Search for the item and instead of deleting it, just set it to inactive within the “**Edit Item**” button.*
- **“None of Hybrent items are showing in the newest facility that was added, can you add those items for that site?”**
    - *You can go into the “ **Items Catalog**” and click the caret dropdown and select “**Map Facility Items**” and chose the facility you'd like to map*
- ***“ I need to create a Service PO for a service that will be done to our lab. However, they are not on the vendor list yet. How do I get them added?”***
    - *Use the Hybrent Form to submit a **Add Supplier Ticket***