Procedure C-4: Asset Management – Supply Distribution to Clinics

I. Delivery Schedule

When preparing orders and deliveries for the clinics, keep this schedule in mind.

	Wednesdays	Thursdays
Pick-up	Courier pick-up at PSC Room 523 no later than 10:00 a.m.	Courier pick-up at PSC Room 523 no later than 10:00 a.m.
Deliveries	Longfellow Room 126 South Room 122 Roosevelt Room 143 Southwest Room E021 Washburn Room 006	Edison Room 107 Henry Room 212 New Family Center
Return	Courier returns to PSC Room 523	Courier returns to PSC Room 523

*All deliveries must be complete by 2:00 p.m.

II. Receiving & Preparing Electronic Orders

A. The clinics will order supplies via two online order forms – Clinic Supply and Meds & Vaccines. These order forms are located on the ClinicSource Web site. Orders are received via an .xml data file that is sent to the designated Asset Manager (Program Aide II).

B. The Asset Manager will save these data files to the appropriate clinic folder under the School Orders folder using the following naming convention with the date of the actual delivery:

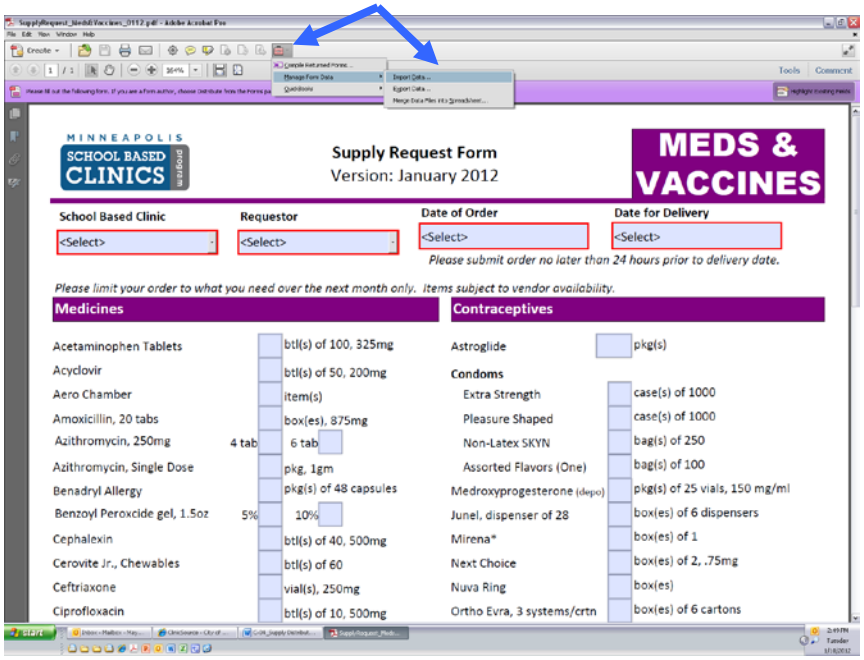
1. SupplyRequest_ClinicSupply_mmddyy.xml
2. SupplyRequest_MedsVaccines_mmddyy.xml

C. Using Adobe Acrobat Pro, open either the Clinic Supply or Meds & Vaccine form under the School Orders folder.
**Adobe Acrobat Pro is not currently installed on the SBC-DC laptop, so you will need to use another computer.*

D. Click on the *Other Form Preferences* button on the toolbar (you may need to add this button to your toolbar)

E. Then choose Manage Form Data and Import Data.

F. Select the .xml data file from the clinic order you wish to fill.



G. Print this form in color on legal paper.

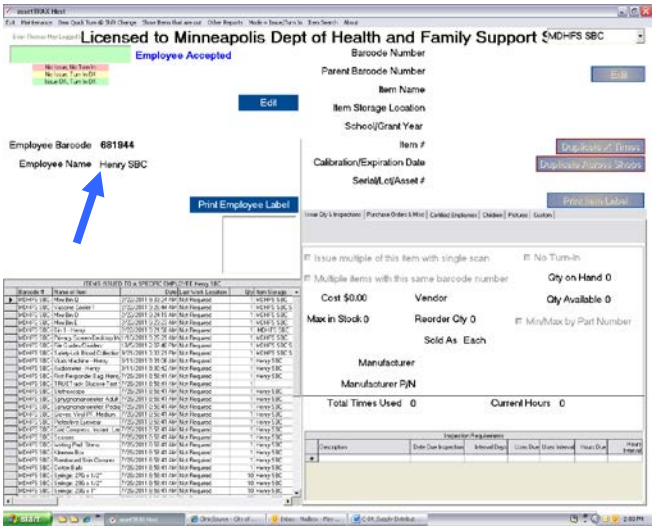
H. Repeat this process for all orders from each of the clinics.

III. Filling Orders: AssetTRAX

A. Log-in

1. All supplies are located in PSC 523: SBC Distribution Center (SBC-DC). Access to the SBC-DC is restricted, so you will need your City ID card or key.
2. Log into the SBC-DC laptop.
3. Open AssetTRAX from the Desktop
4. Scan your employee barcode for the username and password using the yellow scan gun. If you don't have your barcode, it should be listed under the *Quick Scans* tab in the flip file folder next to the laptop monitor. You can also type in your username & password.

5. Scan the barcode of the first clinic you will be filling orders. Clinic barcodes are listed under the *Quick Scan* tab in the flip file folder next to the laptop monitor.
6. AssetTRAX will say "Employee" and the clinic name will appear. Make sure the correct clinic appears before checking out items.



B. Check-out bins to clinic

1. Find the black bin for the clinic you are filling an order.
2. Scan the barcode on the top of the bin to check it out to the clinic.
3. When asked for a passcode, scan the clinic barcode in the *Quick Scan* tab.
4. The following items must be placed in the locked black bin:
   a. All medicines
   b. Syringes & needles
   c. Test kits
   d. All documents in red envelopes (or items with Personal Health Information)
   e. Birth control – NextChoice, Sprintec, Junel, Ortho Evra (if space allows)

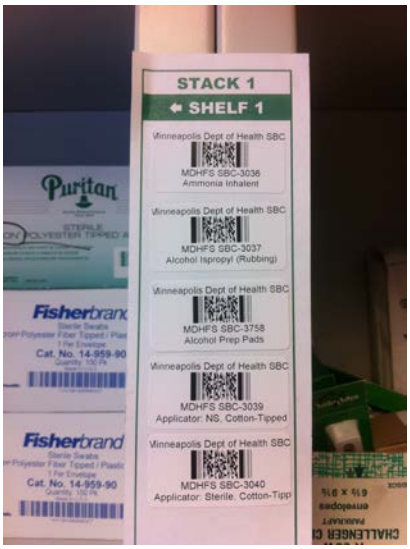
   Other items can be placed in a green bin if there isn't enough room in the black bin.
5. Grab a clear mini-bin and cover located on the table near the windows. Scan the cover. You will use this to collect items.

C. Check-out items to clinic
for vaccines, see section D.

1. Using the Clinic Supply and Meds & Vaccines order forms, look at what the clinic has ordered. The room is setup to mirror the order forms. The labels at the top of each stack will guide you.

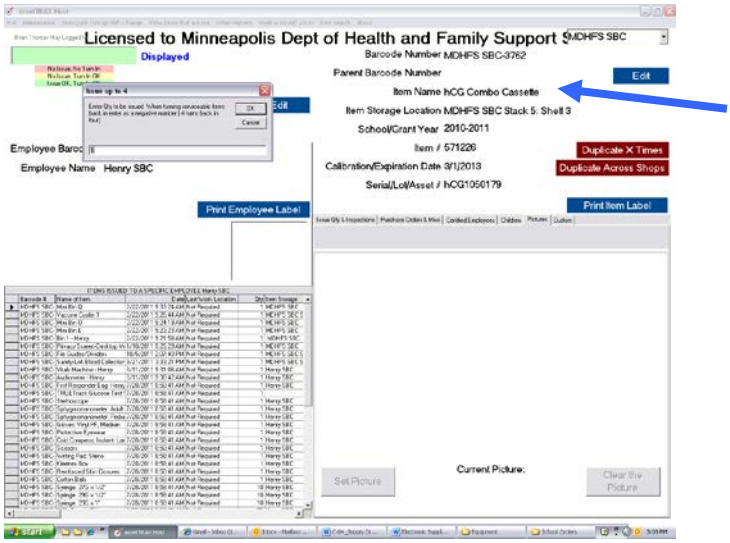
   a. Stack 1 has the first few items located on the Clinic Supply order form and then goes in order through Stack 5.
   b. Stacks 6 – 9: all items listed on the Meds & Vaccines order form. Vaccines are in the fridge.
   c. Stack 10: all of the exam paper products
   d. Stack 11: paper and Ziploc bags
   e. Stacks 12 & 13: the office supplies listed on the Clinic Supply order form
2. Items are organized on the shelf by expiration date and lot number. **It is very important that you take the correct item that matches the barcode in order to track lot numbers used.**
   a. Always take from left to right, front to back.
   b. If items are stacked, proceed to take items from left to right on the next row back. **Do not take from the level below.**

3. Once you find the item the clinic has ordered, you need to scan its barcode to check it out to the clinic. You will find the barcode in one of two places.
    a. On the right side of each stack is a list of barcodes. Most items are on this list.



    b. Some items such as test kits and condoms have the barcode right on them.
    c. Forms, brochures and other paper pads do not have barcodes and do not need to be tracked.

4. Scan the appropriate barcode for the item. If you have items with multiple barcodes (multiple lot numbers), you will need to scan each barcode.
5. Before moving forward, check the screen to ensure you have scanned the correct item. It is possible the scan gun read the wrong barcode.



6. AssetTRAX will ask you to enter the quantity. Enter the quantity for that barcode number.
7. If you encounter a barcode sticker taped to an item, then the current lot number has run out and the rest of the items have a new lot number. Take the barcode sticker off the item and place on top of the old barcode. Then scan that barcode and enter the quantity you are taking.
8. For each item ordered, repeat steps C1-7, taking additional mini-bins as needed.
9. For each clinic you are filling an order, go back and repeat steps A5 – C8 of this section.

D. Check-out vaccines to clinic

The following must be done the morning of the delivery date. It cannot be done in advance.

1. If the clinic has ordered vaccines, take a brown Credo cooler from Stack 9 and scan the tag.
2. Go to the freezer and take a stack of 6 cooler inserts.
3. Open the Credo cooler and place an insert on each wall (bottom, 4 sides and top). They are designed to fit together.
4. For tracking purposes, pediatric and adult vaccines must be sent in separate coolers.
5. Approach the vaccine fridge. Before opening the door, find the first vaccine you need. **Vaccines need to be temperature controlled so it is important to limit the amount time the fridge door is open.**
6. Follow steps C2-8 to check-out the vaccine to the clinic.
7. After scanning each vaccine, immediately place it in the Credo cooler.
8. Once you have checked out all of the pediatric vaccines, place the top cooler insert and close the cooler, but do not zip it.
9. Take a *Ped* Post-it and place it over the Velcro.
10. Zip the cooler shut.
11. For adult vaccine, repeat steps D1-10, but place an *Adult* Post-it on the cooler instead of a *Ped*.
12. Find a Post-it with the name of the clinic the cooler(s) need to be sent and place one on each of the Credo cooler tags… or make your own Post-it.

E. Out of items/Can't complete order

1. If we are out of an item or don't have enough to complete the order, highlight the item on the order form and put the order form in the clinic's mail slot.

IV. Preparing for Delivery

A. Running Reports

Each clinic should receive a "packing slip" in their bin.

1. Click on *Other Reports* at the top of AssetTRAX.
2. Choose *History of Items Issued/Turned in by Employee.*
3. Choose the clinic from the *Employee* dropdown menu.
4. In the *From* date field, choose the day before the scheduled delivery date.
5. In the *To* date field, choose the day of the delivery date.
6. Click *Run Report.*
7. When the report appears, print the report.
8. If you were not able to complete the order, write on the bottom the report the missing item(s) and reason *(backordered, ordered but hasn't arrived yet, etc).*
9. Place the report in the clinic's bin.
10. Repeat A1-7 for each clinic that has a delivery.

B. Packing Bins

1. Check the mail slots for each clinic next to the freezer. Make sure to include any mail addressed to clinic staff and inter-department envelopes. **Any red inter-department envelopes must be locked in the black bin.**
2. Check the table near the windows for any additional items set out for clinics (these would be labeled or instructions given).
3. Remember- the following items must be placed in the locked black bins:
   a. All medicines
   b. Syringes & needles
   c. Test kits
   d. All documents in red envelopes (or items with Personal Health Information)
   e. Birth control – NextChoice, Sprintec, Junel, Ortho Evra (if space allows)
4. Other items can be placed in a green bin if there isn't enough room in the black bin. Clinic labels for the green bins are located in the desk drawer under the forms
5. Make sure black bins are locked and all 8 latches are closed.
6. Make sure any boxes or other items not in a bin are marked with the clinic's name.

C. Loading Zone

1. The courier is trained to take anything outside of the SBC-DC door in the space between the hallway door and the SBC-DC door.
2. Make sure any boxes or other items not in a bin is marked with the clinic's name.

V. Receiving Bins

A. Bin Check-in

1. The courier will drop-off the bins from the clinics in the Loading Zone area outside of the SBC-DC.
2. Bring the bins/items into the SBC-DC.
3. Scan all bin barcodes. AssetTRAX will say "Turn in."
4. Open the bins and scan any mini-bins inside.

B. Handling inter-department envelopes

1. If a general inter-department envelope is addressed to a certain person in PSC 510, you can deliver it to them.
2. If a general or red inter-department envelope is addressed to a clinic or another SBC staff member, then put it in the clinic's mail slot next to the freezer.
3. If a red inter-department envelope is addressed "Registration Forms" or "Encounter Forms," then hand deliver them to Seble. **Red inter-department envelopes signify PHI is inside and must remain locked at all times.** Do not set these out in the open if Seble is not at her desk.

C. Expired meds

1. If a clinic is sending back expired meds, take them out and put them in the bin in Stack 9, Shelf 1 to be dealt with later

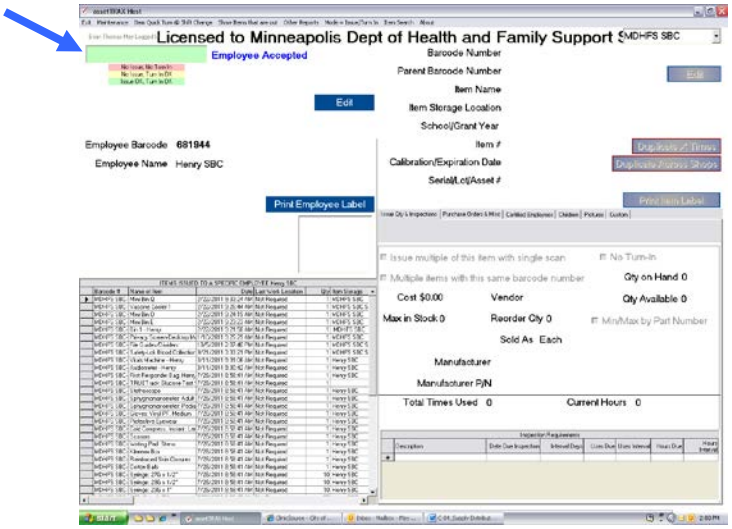
D. Filled Sharps containers and Biohazard bags

1. If a filled Sharps container or red bio bag is in the bin, take it to the Biohazard Room across the hall. The key for this room is on the SBC key ring.
2. Place the container or bag in the large red biohazard bin inside the room

E. Return of good items

If a clinic has included items that they do not need, but are not expired, follow this process:

1. Scan the employee barcode for the clinic in AssetTRAX.
2. Scan the barcode on the item or click on *Item Search* and enter the lot number; then copy/paste the barcode into the main screen field



3. When AssetTRAX asks to enter quantity, put in a minus and then the quantity returned.
   Example: If a clinic returns 2 of the same lot number, you would enter -2

4. AssetTRAX will then say "Turn in."
5. Replace the item on the appropriate shelf (you may need to print a barcode. *See Procedure C-2: Asset Management – Receiving Supplies*).