EPIC TRAINING

Request Stock
Quick Start Guide

HOUSTON
Methodist ®
LEADING MEDICINE

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Request Specific Inventory Items from Suppliers

1. From the **Inventory** activity, click the **Inventory Items** tab.

2. Select items you want to order. A blue check mark (✔) appears next to each item you select.
   a. Scan the item's barcode.
   b. Click in the far-left column to select the item manually.

3. Click ➕ **Create Request**.

4. Check the quantities in the **Req** column. These quantities are calculated automatically based on current inventory levels, but you can edit them if you need to order a different amount.

5. Choose a different NDC or contract for certain items in the **NDC** and **Contract** columns, if needed, and then click **Submit Request**.

The status of each request appears on the **Outgoing Requests** tab of the Inventory activity.

Status	How did it get there?	What happens next?
Draft	Either one of the following: • A user manually created a request and clicked **Save as Draft**. • An automated batch job created a suggested inventory request.	Review the request in the **Outgoing Requests** tab and click **Submit Request**.
Submitted	This is a non-contracted supplier order. The request was submitted and is ready to be entered into the appropriate supplier's portal.	Find the printout and manually enter the request.
Submitted - Initiated request to supplier	This is a contracted supplier order, and an interface message corresponding to the request was sent to that supplier.	The supplier receives the request and fulfills the order.

Submitted - Failed to send to supplier	Epic attempted to send a request to the contracted supplier through an interface, but an error occurred.	Open the purchase request to see the corresponding error messages. Identify the root cause and resubmit the request. Contact your Epic representative if you need assistance.
Submitted - Accepted by supplier	The request was sent to the contracted supplier through an interface, and the contracted supplier sent back a confirmation message.	The supplier sends a message that the shipment is on its way.
Shipment notice received	The supplier has sent all or part of the shipment for the purchase request.	Receive the shipment.

> **!** The **Request** and **Package Size** columns work together to determine how much you are requesting. This relationship is set up in the contract, and only pharmacy managers can change it. This workflow differs from using **Direct Transfer**, where you can specify and change the unit yourself.

Request all inventory items below a certain level

1. From the **Inventory** activity, click the **Inventory Items** tab.

2. In the **Filter by** field, select the items you want to request, such as Items below par for all items with balances below par. The list of inventory items is filtered accordingly.

3. Click the column header with the blue check mark (✔) to select all the items in the list, and then click ✚**Create Request**.

4. Check the quantities in the **Req** column. These quantities are calculated automatically based on current inventory levels, but you can edit them if you need to order a different amount.

5. Click **Submit Request**.

> **ⓘ** Click the filtering button you previously selected to return to the full list of inventory items.