HANDHELD: CASE CART MANAGEMENT

Proper Case Cart Management ensures the timely fulfillment of stock, accurate confirmation of case item usage, and putaway of unused item quantities. Follow the steps below to plan and pick a Case Cart.

PLAN CASE CART (desktop only)

1. After launching the **Cases** resource, set the case Status as **'1-New'** and specify the desired Procedure Date. Select **Search**.

2. Select the multi-row function menu and then select **Plan** from the drop-down choices.
*The case Status changes to **'2 – Planning in Progress'** and then to **'3- Planned'**, once the record is refreshed.

3. Once the case Status is set to '3-Planned', you can both **Replan** the case and **Print the Pick List** from the Case's multi-row function menu.

4. Review possible shortages in the **Case Shortages** resource. Filter by case and select **Search**.

PICK CASE CART

1. After launching the **Case Pick** resource, enter the case identifier in the **Case** field. Select **Continue**.
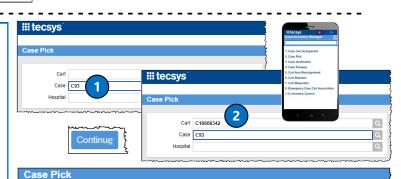
2. Scan the cart license plate label, lookup or enter the cart identifier in the **Cart** field. Select **Continue**.

3. Locate the first item in the pick list and retrieve the item by **scanning** the item or bin location to **confirm** the pick.

4. Accept or enter the **Picked Quantity** and any additional information, if required.

5. For **tissues**, **package integrity**, **temperature within ranges** are required.

Note: If an item has a lot and expiry information, it will populate as the allocated lot determined during planning.

HANDHELD: CASE CART MANAGEMENT

Proper Case Cart Management ensures the timely fulfillment of stock, accurate confirmation of case item usage, and putaway of unused item quantities. Follow the steps below to verify and putaway a Case Cart.
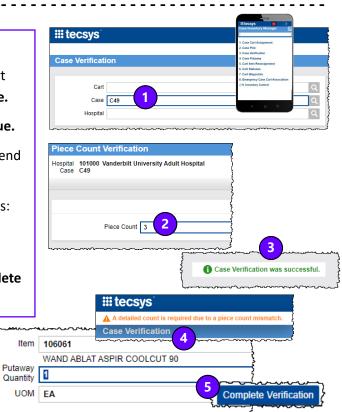
VERIFY CASE CART

1. After launching the **Case Verification** resource, **scan** the cart license plate label or enter the Case identifier. Select **Continue.**

2. **Confirm** the piece count of items on cart and select **Continue.**

3. If piece count matches usage expectations, the system will end verification.

4. If the piece count **does not match** the system's expectations: **scan** each item's identifier, quantity to put away, and additional details. Select **Continue**.

5. Once all items on the cart have been counted, select **Complete Verification.**
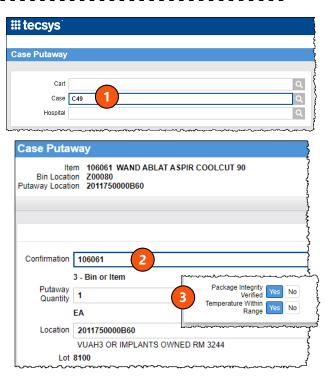
PUTAWAY CASE CART

1. Launch the **Case Putaway** resource and scan the cart license plate label or enter the Case identifier. Select **Continue**.

2. **Scan** each item, **confirm** put away quantity and additional details, if required.

3. For **tissues**, **package integrity** and **temperature within range** are required.

4. When all items have been put away, the message "Case Putaway was successful" will appear. Select **Ok** to acknowledge.