

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**.

Case	Cart	Cart 2	Procedure Date	Shortage Quantity	UOM	Inventory Available
C21			08/17/2021 17:41	1	EA	0+

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.

Confirmation: 142828

3 - Bin or Item

Picked Quantity | UOM: 1 | EA

PRN: 0

Lot: 9797

08/03/2022

Input Expiry Date

Package Integrity Verified: Yes (selected) / No

Temperature Within Range: Yes / No

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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**.

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Case Inventory Manager

Case Verification

Cart: []
Case: C49
Hospital: []

1

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Piece Count Verification

Hospital: 101000 Vanderbilt University Adult Hospital
Case: C49

Piece Count: 3

2

3

Case Verification was successful.

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A detailed count is required due to a piece count mismatch.

Case Verification

Item: 106061
WAND ABLAT ASPIR COOLCUT 90
Putaway Quantity: 1
UOM: EA

4

5

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.

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Case Putaway

Cart: []
Case: C49
Hospital: []

1

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Case Inventory Manager

Case Putaway

Item: 106061 WAND ABLAT ASPIR COOLCUT 90
Bin Location: Z00080
Putaway Location: 2011750000B60

Confirmation: 106061

3 - Bin or Item

Putaway Quantity: 1
UOM: EA

Location: 2011750000B60
VUAH3 OR IMPLANTS OWNED RM 3244
Lot: 8100

2

3

Package Integrity Verified: Yes No
Temperature Within Range: Yes No

4

Case Putaway was successful.

OK

QUESTIONS?