How to transfer product

Step #	Execution Procedure or Input	Expected Result or Output
1	Hover over the inventory tab and select **Transfer.**	**System should refresh the screen and display blank receiving site information (Transfer To ID, Name, Address, and Phone)**
2	Enter the Provider Location to whom you are transferring product. Contact provider to get location code or program help desk if you do not have it.	**System should refresh the screen and add receiving site's Provider Name, Phone, Address, City, State and Zip. System should generate an order number.**
3	Verify the Provider demographic information	**In production call to the transfer site to verify their hours of operation, contact and address.**
4	Enter the amount you want to transfer in the **Unit's** column next to product wishing to transfer.	**System should allow you to select the item you wish to transfer**
5	Populate the following fields: '**Units'** with amount less than or equal to ' **Total Quantity'**	**System should allow you to populate the units to transfer for each item to be transferred. The amount to transfer may not be greater than the available quantity for transfer.**
6	Add text into **Comments** box. Add comments greater than 600 characters.	**The system should allow you to enter up to 600 characters of text – and error when amount exceeds.**
7	Add name and date in '**Transfer Approved By'** field	**Enter name and today's date**
8	Click **Save.**	**Confirmation screen should appear.**
9	Verify 'Transfer Item Confirmation' screen.	**Should be populated with Order number, Tracking ID, Sending Site ID, address, phone, contact name. Receiving Site ID, Address, phone, contact name., Comments, Line Item Detail(s), Date and Approvers name**
10	Hover over the 'Inventory tab', click on the Transfer menu choice.	**System should refresh and show you a hyperlink stating Historical Transactions.**
11	Click on Historical Transaction hyperlink	**System should take you to a secondary menu showing Transfer History and column headers of Order, Order Status and Order Date.**
12	View **Transfer History** order number and date for the current Transfer	**System should show the current transfer order number, today's date and status = Shipped.**
13	Click on the + sign next to the order number for today's transfer.	**System should provide detail information and match the confirmation page.**

Transfer Screen

Transfer **INSTRUCTIONS:**

Note: Communicate with the provider who will be receiving the items. Confirm the address and hours of operation before shipping any item.

1. Enter the location code of the provider to whom you are transfering the product. Click Go.
2. From the items in your inventory, enter the number of items (in eaches) for each lot and the associated reason for transfer.
3. Add comments and your name.
4. Click Save.
5. Print a copy of the Transfer form to include as a packing list in the shipping package. Write the order number on the form.

Click on the Historical Transactions link to the right to view items that you have transfered out of your office.

NOTE: Click Save only ONCE and please be patient while the transfer form is processed and displayed. If you click save more than once, duplicate transfers will occur. If needed, click on Historical Transactions link to verify the transfer and print the form to avoid duplicating transfer orders.

Historical Transactions

Transferring To:

Location ID: [   ] [Go]

Provider Name: Phone: Order Number: 163752 Order Date: 04/08/2013
     Address   Contact:

Item Number	Description	Lot	Expiration	Quantity on Hand	Units to Transfer	Reason For Transfer

Comment: [   ]

Transferred By: [   ]   [Save] [Cancel]

Click ONCE on the Save button.

Transfer screen after site selection

Order Number: 163245-00			Tracking Number: C000026199		

Transferring	FROM:			TO:	
PIN/Customer ID:	06-039010000			04-183060000	
Facility Name:	Brazoria County Health Dept.-Angleton - LHD			Northeast Texas Public HD - LHD	
Address	432 E. Mulberry			815 North Broadway Ave	
				Bldg. 2	
City/State/Zip	Angleton, TX 77515			Tyler, TX 75702	
Phone:				8888888888	
Contact:				Tall Tim	

Description	Item Number	Lot Number	Expiration	Actual Qty	Reason
LEVOFLOXACIN TAB 750MG 20	65862053820TB	BBBB	5/30/2016	3.00	I like to Transfer Stuff
PYRAZINAMIDE TAB 500MG 100	67253066010TB	POL4	12/31/2013	4.00	Needed by another Provider
			Total Doses	7.00	

Comments
this is susan writing in the
commentsxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

sec	_____	3/4/2013
CompletedBy	Signature	Date

Print

Transfer Order Confirmation Report

Transfer Order History Screen