New York State Health Commerce System

Medical Emergency Response
Inventory Tracking System

MERITS

Administrator Training Guide

version 6.5

Revised November 2024

INTERIM CHANGE SUMMARY

The following Interim Changes / Updates have been incorporated into this Training Manual

CHANGE NUMBER	DATE	PAGES	SUMMARY/PURPOSE
1	*January 25, 2023*	*13*	*New List of Units of Issue*
2	*January 26, 2023*	*12-17*	*Updated Training Scenario 4: Request an Item Be Added To Item List*
3	*April 24, 2023*	*All*	*Removed all references to User Acceptance Testing and add scenario tips throughout* *Removed Training Scenario 10 - Duplicate of Scenario 5*
4	*August 30th 2023*	*7*	*Updated Changes to Training Scenario 1 Editing Inventory*
5	*August 30th 2023*	*13*	*Updated Changes to Training Scenario 2 Add Item Request - SNS Item Category added*
6	*September 6th 2023*	*28*	*Updated Changes to Training Scenario 10 Managing Inventory > My Inventory > Quarantine Tab now Item Status and Item Inventory is Now Item comments*
7	*September 6th 2023*	*29*	*Updated Changes to Training Scenario 10 Managing Inventory > My Inventory > Edit Inventory Convery Unit of issue layout changed*
8	*November 25 2024*	*9*	*New Site Types will be available in a future release*

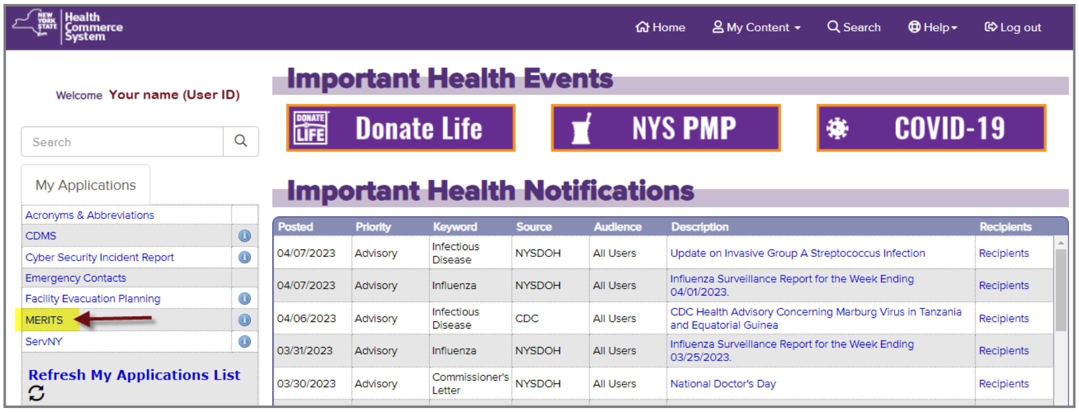
Objectives

The MERITS Administrator Training Guide demonstrates the following:

- Search, view, and export Master Inventory
- Search and add sites when needed.
- Plan and set up location information for each site.
- Request asset to be added to Item List (Manage Items)
- Receive Inventory
    - Existing
    - From NYSDOH/MERC
    - Newly purchased items
- Update Inventory Location from the Loading Dock to Storage Area
- Adjust inventory quantity.
- Convert existing item in inventory to smaller units.
- Ship an order (Issue Order)
- Generate and download reports

Your HCS Account

1. Have your Health Commerce System (HCS) user ID and password available for use.
2. Verify that your business and emergency contact information is correct.
3. Confirm you have been assigned the proper role to access MERITS (**My Content > See what roles I hold**)



Access to MERITS

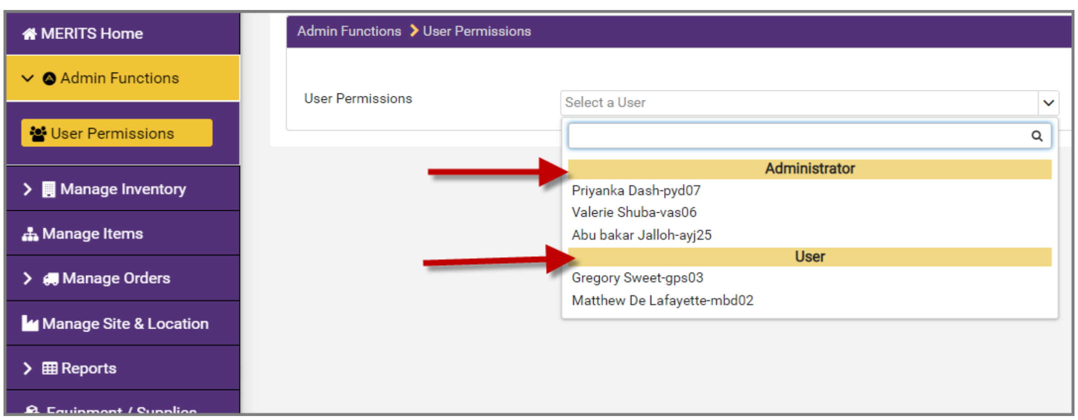
1. Role assignments are granted by your HIN/HCS Coordinator. Roles are:
   - MERITS Administrator or
   - MERITS Data Processor

2. Click **MERITS** in My Applications to open applications.
3. If you need assistance with MERITS, click the blue info icon 

for who to contact or link to Application Assistance documents.

MERITS Administrator Edit Permissions

Version 6 (2023)– the MERITS Administrator can view the User Permissions and further edit the default permissions from **Admin Functions** > **User Permissions**:



If your list of users is long, then you may need to scroll down to all Administrators and Users.

Select a user's name to further manage their permissions as a co-administrator or user. The dropdown list is based on the MERITS role assignment by the County's Coordinator. Possible roles are either MERITS Administrator or MERITS Data Processor (aka User).

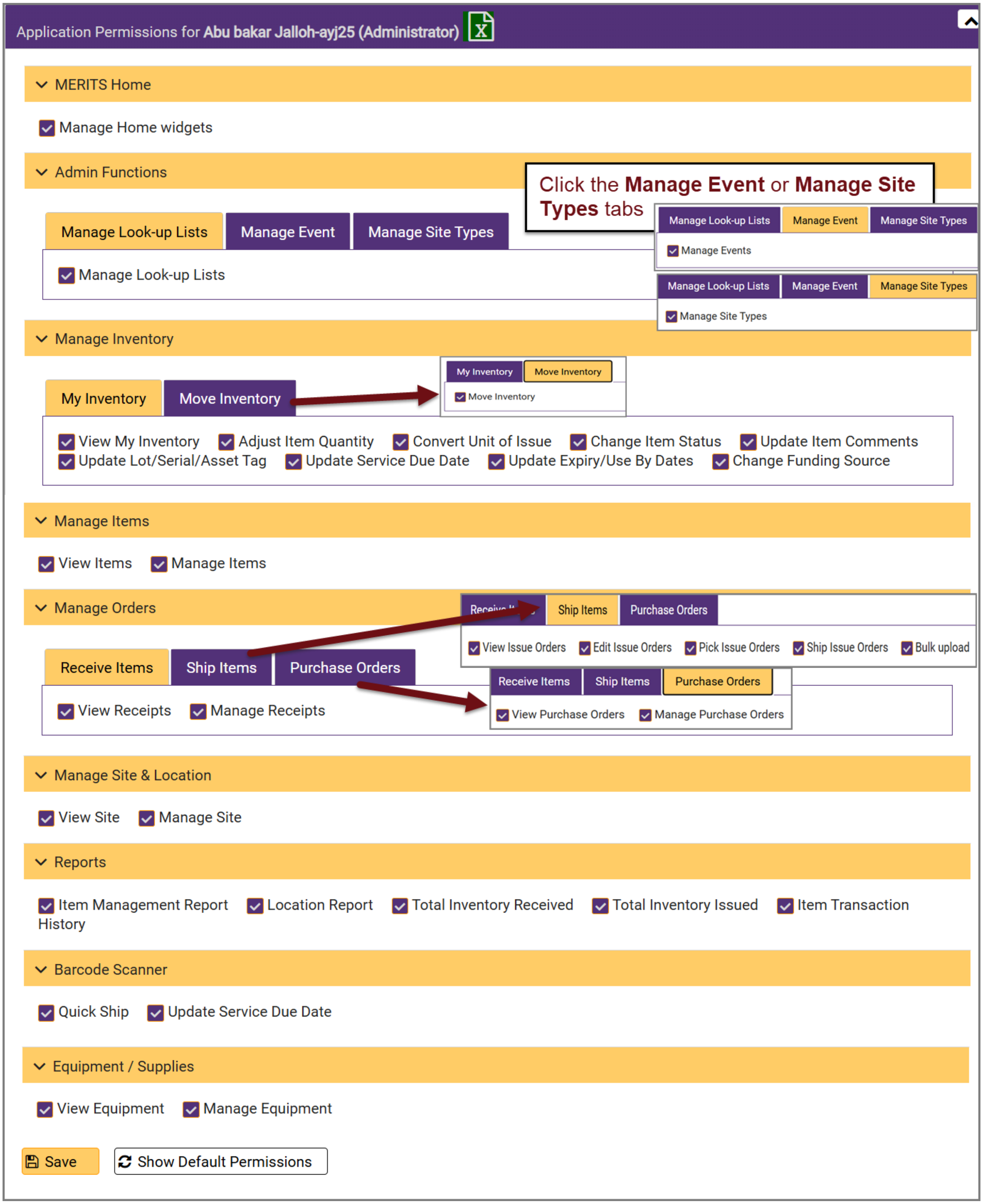


Figure 1: User Permissions

Changes can be made to both Administrators and Users (Data Processors) by selecting or unselecting boxes from the following sections:

- MERITS Home > Manage Home widgets is for State Admins only.
- Admin Functions (Manage Look-up Lists, Manage Event or Manage Site Types)
- Manage Inventory (My Inventory and Move Inventory)
- Manage Items
- Manage Orders (Receive Items, Ship Items, and Purchase Orders)
- Manage Site and Location
- Reports
- Barcode Scanner
- Equipment/Supplies.

Manage permissions by checking and unchecking the boxes to view, manage, etc.

Click Show Default Permissions to select all options and click **Save** to save the default (all checked) permission edits.

Notes:

Training Scenarios

TRAINING SCENARIO 1: VIEW LIST OF ASSETS ON-HAND

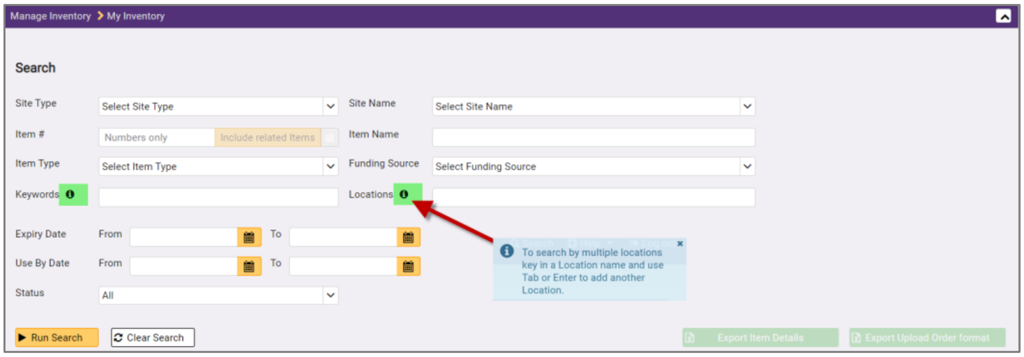
My Inventory is the list of assets/items you have on-hand at the specified **Site Type** and **Site Name**. This list is accessed from the **Manage Inventory** menu.

To view and export your complete list of assets (items) with on-hand quantities, unit of issue, location, etc.:

1. Click **Manage Inventory** > **My Inventory**
2. Select search criteria, such as Site Type and Site Name
3. Click **Run Search**
4. View the list or export results to Excel as a .csv file by clicking the export icon or by Exporting Item Details

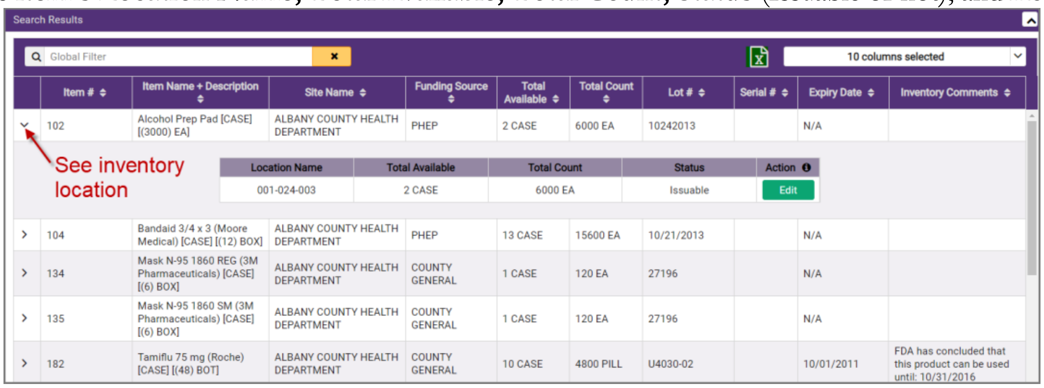
NOTE: My Inventory's search criteria screen includes multiple search/filter options.

Click the information icon for more information:

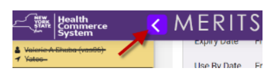


Search Results Table:

Click **>** to see **item's Location Name, Total Available, Total Count, Status** (Issuable or not), and **Action**.

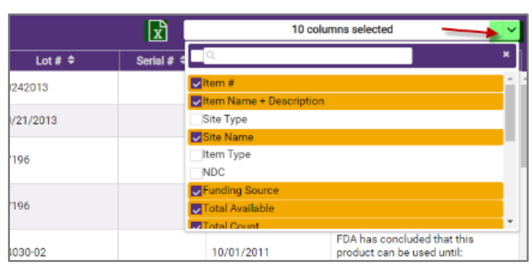


TIPS:

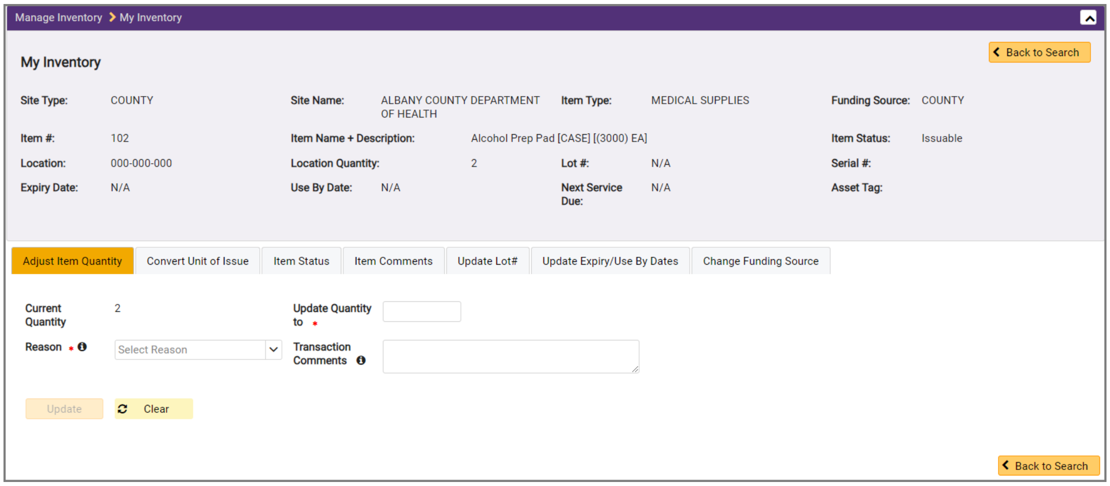
- Hide left-side navigation to expand the results table by clicking the **<** to the left of MERITS. 

- Results can be sorted in ascending or descending order by clicking on the column headings once or twice.
- Use the **Global Filter** to narrow the search results.
- Change **Records Per Page** and see **Total Record count** or go to next page, previous page, beginning or end of results:

- Change what you see in **Search Results** by adding or removing the column headings from the table for a customized view. See dropdown top right of results table icon:

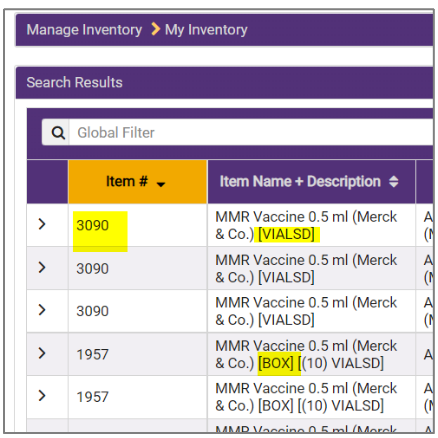


- Click the right caret > to expand **Item** details.
- Click the down caret ﹀ to hide details.
- After expanding **Item** details >, click Edit from the **Action** column to make changes to your inventory such as: Adjust Quantity, Convert Unit of Issue, Quarantine, add Inventory Comments, Edit Lot #, Expiry/Use by Dates or Change Funding Source
- **Edit** opens a new page with all the edit option tabs:



- Click **< Back to Search** button located at top and bottom of the edit item page.
- Checking **Include related items** in Manage Inventory > My Inventory will search for that item's units of issue (children) and include them in the results. For this example, search by Item # 1957 (MMR Vaccine box of 10 Vials), and **the Include related items** is checked, then search also returns Item # 3090 MMR Vaccine Vials:

  Search results display both item # 1957 (box) and 3090 (vial):



- Export Details Report includes the Items' locations. The Upload feature is currently not available.

Export Item Details can be used to see the location of inventory on-hand, the units of issue at the location, and the total available. It also provides separate columns for the Lot# and Serial #.

Export Upload Order Format is currently for State users to bulk upload multiple issue orders being sent to different delivery sites and will be available to counties in the future. The extract includes Item, Funding, Quantity, Lot #, Serial #, Expiry Date, and Location.

Notes:

TRAINING SCENARIO 2: ADD A SITE

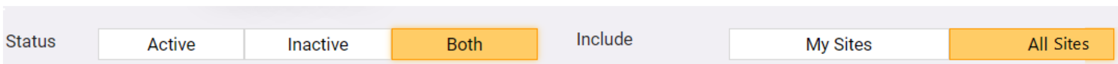
Your county has a new POD site, and you need to add it to MERITS.

Types of Sites are County, Disposal, Forward Deploy, MERC & RSS, Other, Pharmacy, POD, Treatment Facility, and Vendor. Other site types can be added per request.

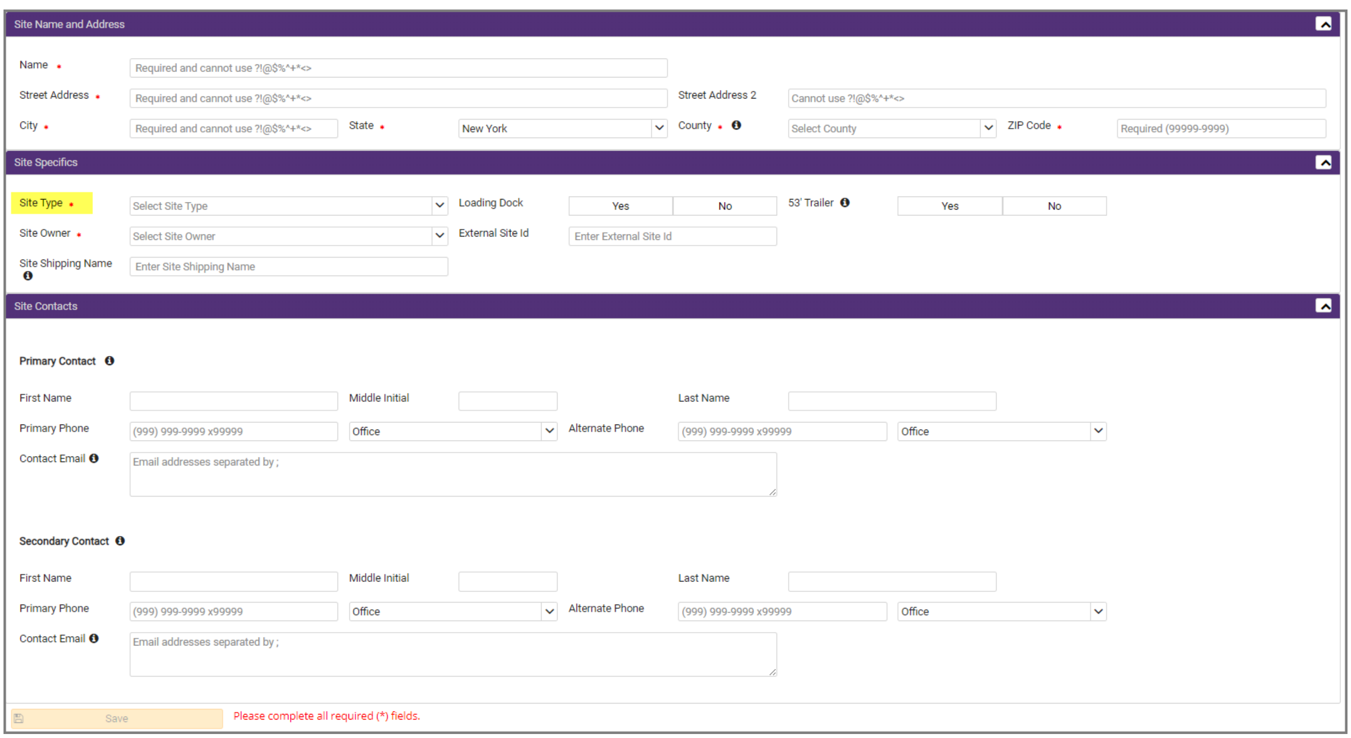
Note: 6.5 included options for creating additional site types, like nursing home, adult care facilities, restaurants, etc. The state will add them in a future release.

Adding and inactivating sites is best done in advance. Think of sites as any place/address you may need to send inventory to, such as a POD, or receive from, such as a vendor. Adding sites ahead of time allows you to efficiently ship assets to these locations for trainings, exercises, or PODs.

Before entering a new site, always search for **Both** active and inactive existing sites. Check **All Sites** for places used by other counties and for State-owned sites too:



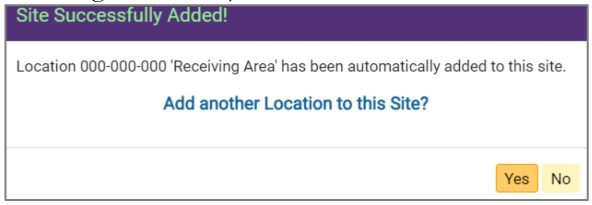
1. Click **Manage Site & Location** All Active – My Sites loads by default.
2. Select **Both** active and inactive sites.
3. Click **Run Search**
4. Review the full list of Sites - use sort and filtering to be sure the site is not already listed (**Tip** - check inactive sites)
5. Click **+ Add New Site** (top right)
6. Enter all required site info: Site Name and Address, Site Specifics and Site Contacts
7. Click **Save**



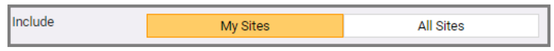
TIPS:

- Use the Primary Contact for county personnel and Secondary Contact for location staff.
- Enter multiple email addresses in one field are separated with a semicolon (**;**)

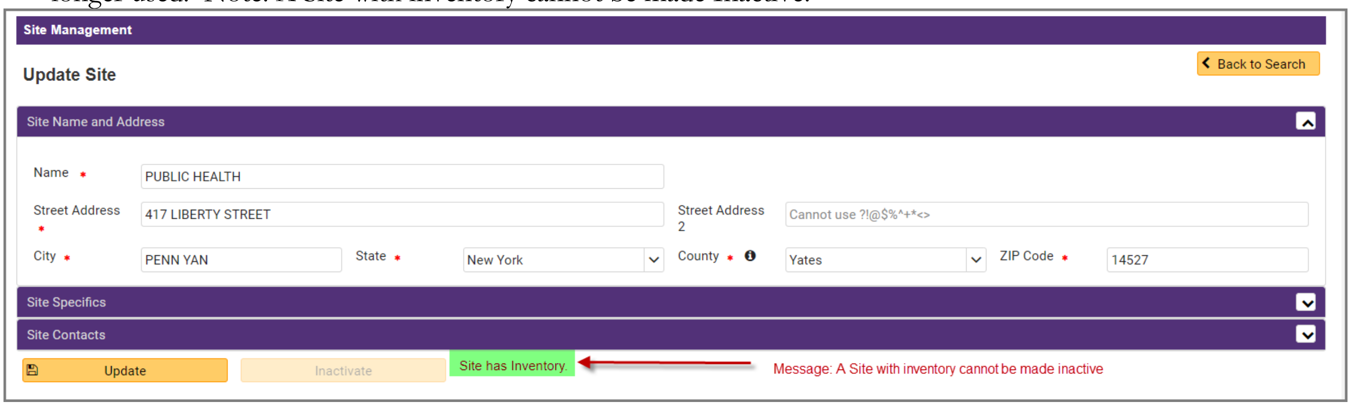
- After saving the new site, you will be prompted to add a location to this new site. A location identifies where at the site your inventory is being stored. e.g., Aisle 5 Row 1 Shelf 3. Therefore, a detailed plan and location layout are helpful (see next Training Scenario 4):



- **My Sites** will search for all sites you created.



- Review **My Sites** (both active and inactivate) to confirm list is accurate and inactivate the sites that are no longer used. Note: A Site with inventory cannot be made Inactive:



This scenario demonstrates how to search for a site before adding it to MERITS.

Notes:

TRAINING SCENARIO 3: MANAGE LOCATIONS

A location is a place at your site where inventory is stored. Add the storage location information to the site you just created.

Important: Defining storage locations should be done in advance. The benefit of creating locations in MERITS is that you will always know where an item is kept, and you can generate various location reports to see how much inventory you have.

Planning location names and having room layout diagrams will help prevent sending assets to incorrect locations. Location names should have meaning to your users. The 000-000-000 format is no longer required.

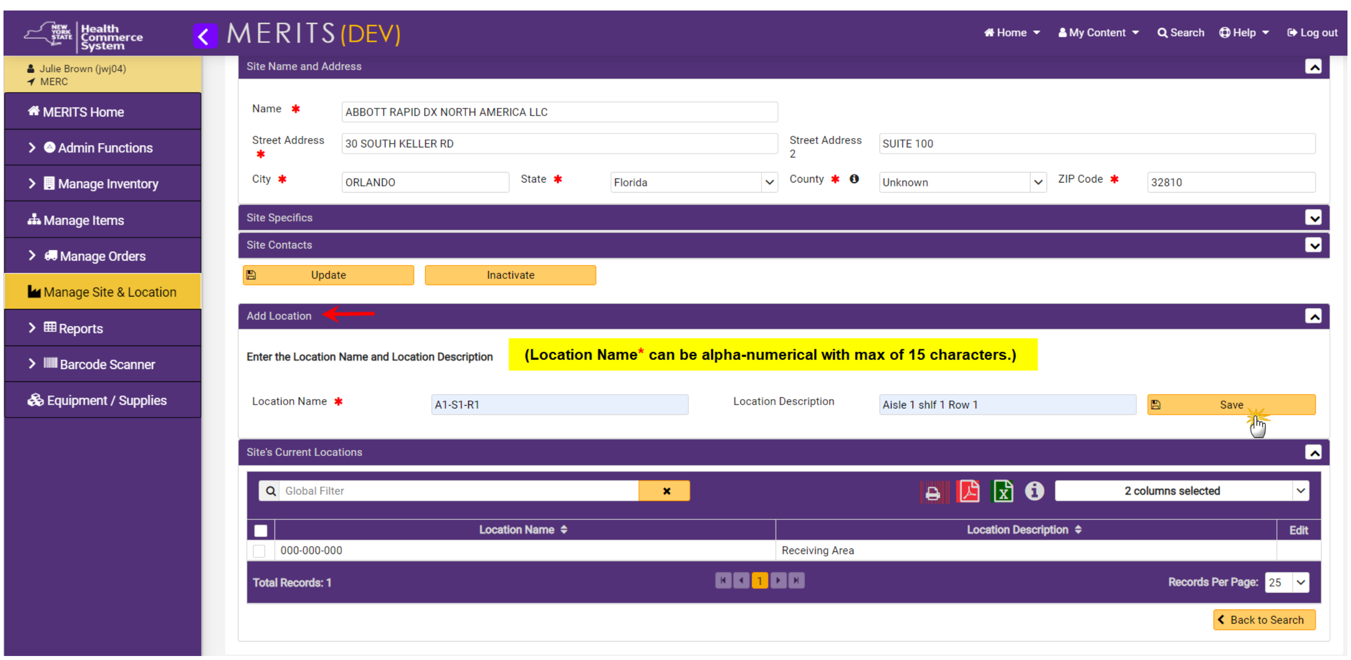
1. Select **Yes** for **Add another location** (if following Training Scenario 2)

   OR

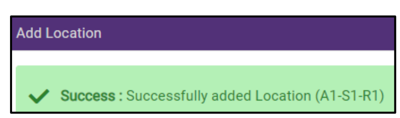
   Click **Manage Site & Location > Search for a Site and click on Site Name**
2. Enter Location Name * and Location Description (optional)
3. Click **Save**
4. Repeat for all locations at the Site.

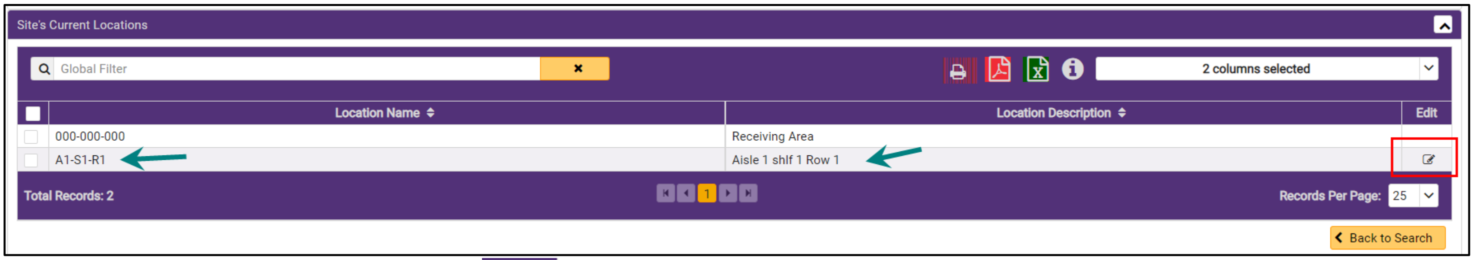
TIPS:

- The used and empty location reports is very useful when conducting inventories and finding errors in your warehouse counts.
- Location Name can be alpha-numeric with a max of 15 characters.

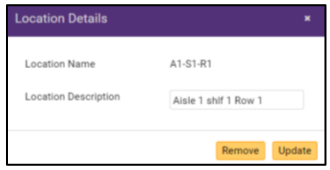


- Always confirm the success message that location has been added:





- Locations can be edited  or deleted if it does not have any inventory. (Location description can be edited)



- Think of location numbers like an address:
  - 001-005-003 = street 1 building 5, floor 3
  - 01-05-03-001 = street 1, building 5, floor 3, apartment 1
  - ANX-01-02-01 = City ANX, Street 1, building 2, floor 1
- In general, use dashes for separation (spaces between words can be confusing and underscores may be harder to type or read). Location names should follow a basic format such as from big to small; or general to specific. For example: Building-Aisle-Bay-Level-Slot. Location may also include descriptions such as, MainCooler or ShelfTopStairs.

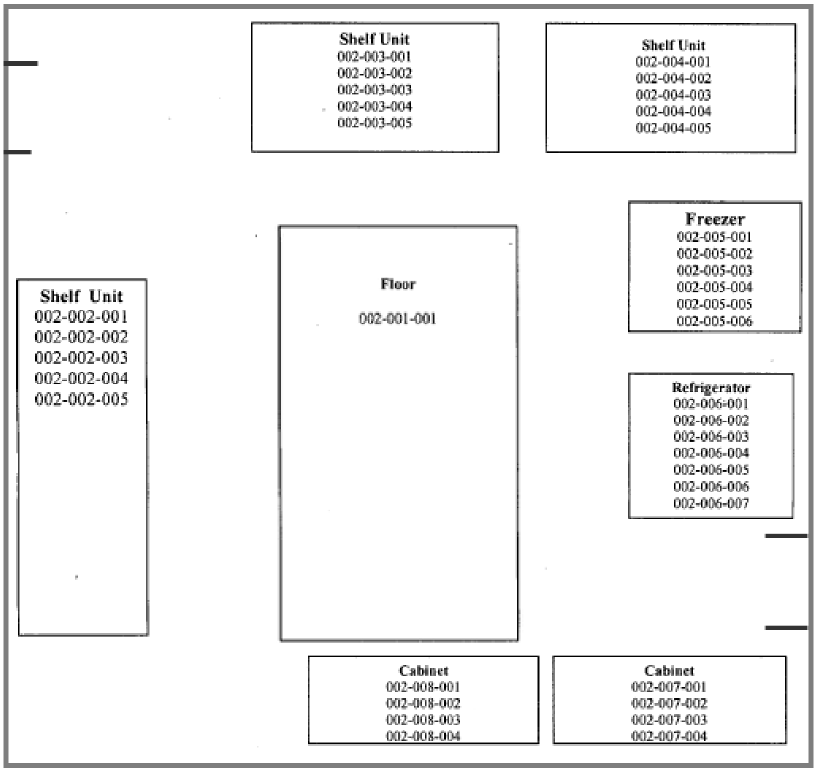
- Whatever naming convention you use, **have a plan and be consistent**, and use the plain language to best describe the location. If using numbers, then be consistent.

- Having a floor plan with location info will help you be organized.

- Don't forget to include a location for the tops of cabinets and floor below shelves for items to be stored.

- All sites have the default location of 000-000-000 Receiving Area. This location cannot be modified or removed.
- Received Items are assigned to the Receiving Area by default.
- Examples of descriptions:
  Right side of storage cage, Surge floor, locationPOD, cart 5 (Creating a location like this can be used for a kit and you can track the items in the cart individually).

Location Floor Plan (sample):
Location Info (XXX-XXX-XXX) is translated as room – shelf – bin.

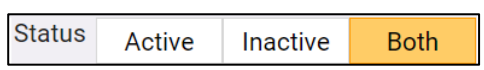


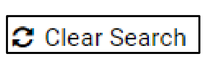
Notes:

Training Scenario 4: Request an Item be Added to Item List

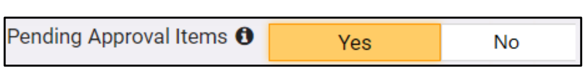
Prior to processing a receipt order in MERITS, the item needs to be in the Item list.

Always search for the item first to avoid duplication:

1. Click **Manage Items**
2. Search for items in **Both** Active and Inactive status 

3. Click **Run Search** and review the results for the item being requested
   a. If you don't see it, then click 

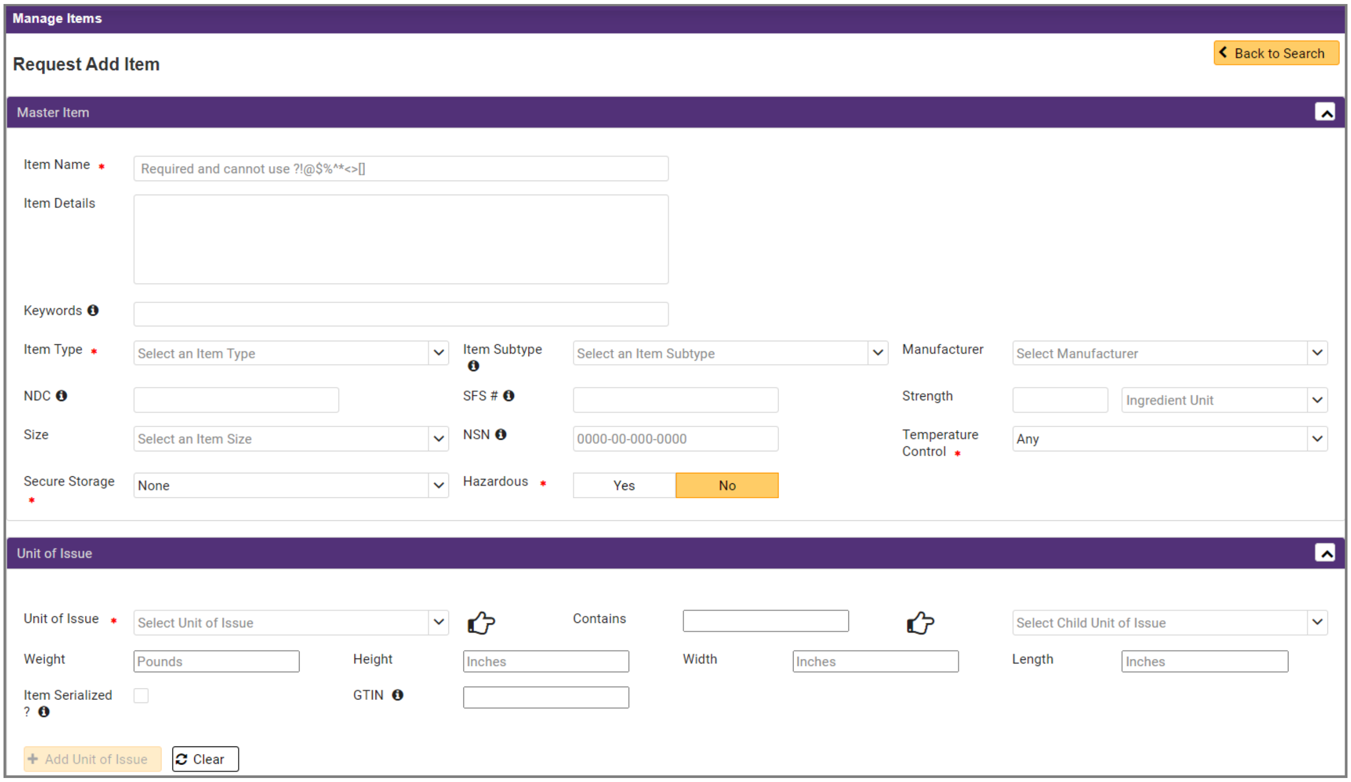
4. Run a new search for items in **Both** Active and Inactive status, and select **Yes** for Pending Approval Items



5. Click **Run Search –Tip** if item is not found try various name search options, keywords, or global filter.
    a. If the message "Warning: No Records found with given search criteria," displays, then click.

(Top right) to open **Manage Items Request Add Item**:

In **Master Item** section:



6. **Enter Item Name** * (required) - cannot use following characters: ? ! @ $ % ^ * <> [ ]
7. Add **Item Details** and **Keywords** (both optional)
    a. In item details enter information about item, vendor item number, what it is made of, part number, even the manufacturer or vendor website link can be put here. Usually, you can copy and paste the info from the vendor site, and it should have as much level of detail as possible.
    b. The field **Keywords** may contain up to ten words. Use the tab key to add each additional word.

        TIP - For keywords do not use the same words that are in the item name, add the vendor item number, or numbers that would be cross reference. Add commonly used names for items that might be different than the actual name, add plural versions of the name (masks, gloves).

8. Select an **Item Type** * (required)
9. Select **Item Subtypes** (optional) - these allow for additional sorting and summary options when creating inventory reports.
10. Select **Manufacturer** (optional) - Manufacturer Name can be entered in the Item Details, if not listed as a choice (if known please enter)
11. Enter **NDC** (optional) National Drug Code – all pharmaceuticals or products with active ingredients will have an NDC.
12. Skip **SFS #** (Statewide Financial System Cross Reference ID) - State use only
13. Enter **Strength** (optional) (if known enter)
14. Enter **Ingredient Unit** (required when Strength is entered) if known enter.
15. Select **Size** (optional) if known enter.
16. Skip **NSN** (National Stock Number used by the Strategic National Stockpile) - for State use only.
17. Select **Temp Control** * required with default of Any - select another option: Refrigerated or Room Temp if applicable.

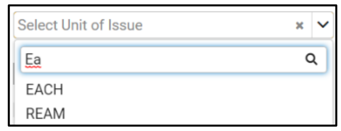
18. Select **Secure Storage** * required with default of None - select another option: DEA Compliant or Secure Storage if applicable.
19. Change **Hazardous** * to Yes, if applicable - default is No

TIP: For any fields that the value to be entered isn't available in the dropdown or you don't know where to put it, just add the info to the **Item Details** section and the State system admins will make the change.

NEXT, after completing the **Master Item** Section, the **Unit(s) of Issue** sections needs to be added to the item. All Items will have a least one Unit of Issue.

20. Select a **Unit of Issue *** (required) from the drop-down list.

    You can search for the unit by typing in part/all of its name.



21. Enter the Unit of Issue's **Weight, Height, Width and Length** (optional, but please enter if known especially for heavy or large items. This information is helpful when planning for transportation.)
22. Check the box for **Item Serialized?** if applicable.

    Click the icon for information about serialized items - Examples of serialized items are ventilator, data logger, vaccine, kit, oxygen concentrators.

23. Enter a **GTIN** (optional) -click the icon for information about this identification number.

    Note: Clicking Clear will clear all data entered in the Add Unit of Issue section.

A Unit of Issue is the quantity of the Item such as a **Pill**, a **Bottl**e of 30 Pills, or a **Box** of 100 Bottles.

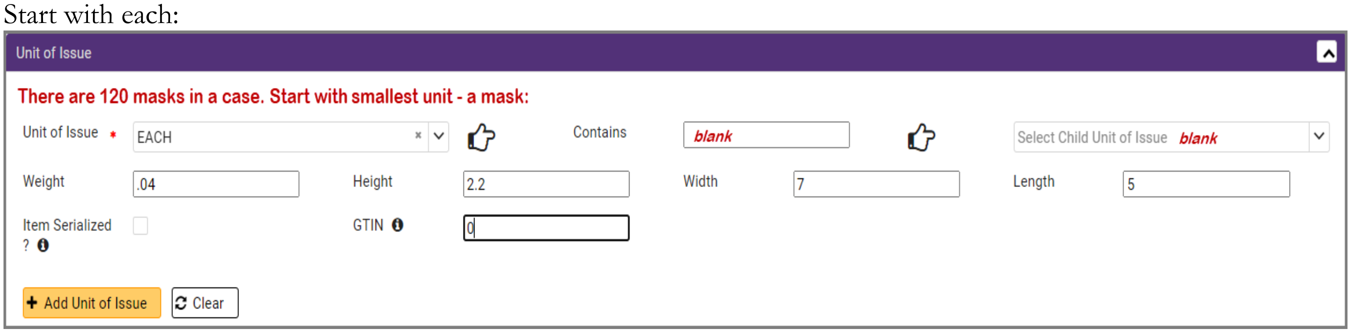
In demonstration: **Each** mask, a **Box** of 20 Masks, or a **Case** of 6 Boxes equals 120 masks in a case.

Some items such as a Ventilator, will have only one unit of Issue which is Each (the Ventilator).

To properly build a Unit of Issue, begin with smallest unit and build up to the larger packaging. This allows the items to have additional packaging options, if needed. In other words, a pill can go in a bottle, the bottle in a box, the box in a case, a case in a pallet, etc.

Example of a case of masks

Start with each:



Leave **Contains** and **Select Child Unit of Issue** <u>**blank**</u> for the item's smallest unit of issue.

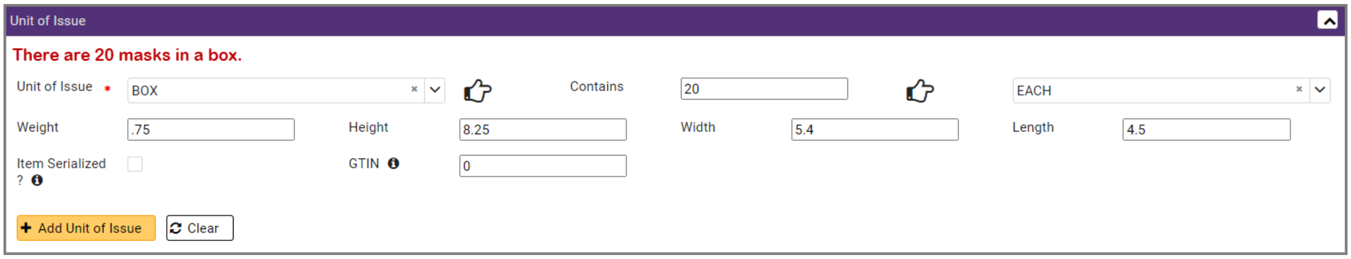
24. Enter the Unit of Issue's **Weight, Height, Width and Length** (optional, but please enter if known especially for heavy or large items. This information is helpful when planning for transportation.)
25. Check the box for **Item Serialized?** if applicable.
    a. Click the icon for information about serialized items.

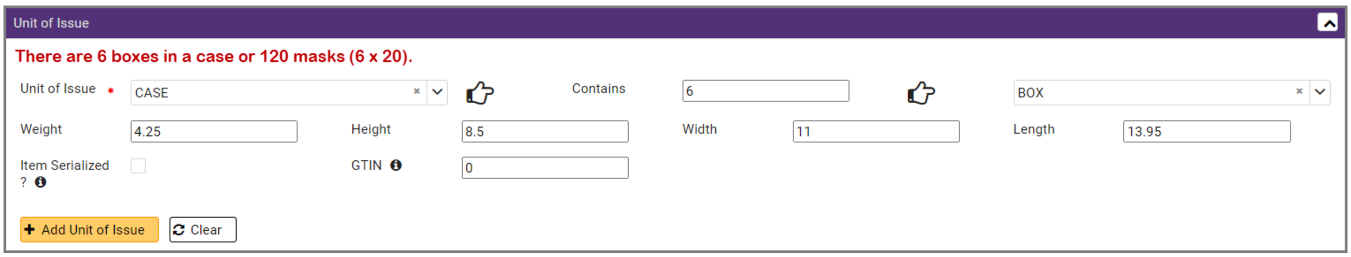
26. Examples of serialized items are ventilator, data logger, vaccine, kit, oxygen concentrators Enter a **GTIN** (optional) -click the icon for information about this identification number.

Note: Clicking Clear will clear all data entered in the Add Unit of Issue section.

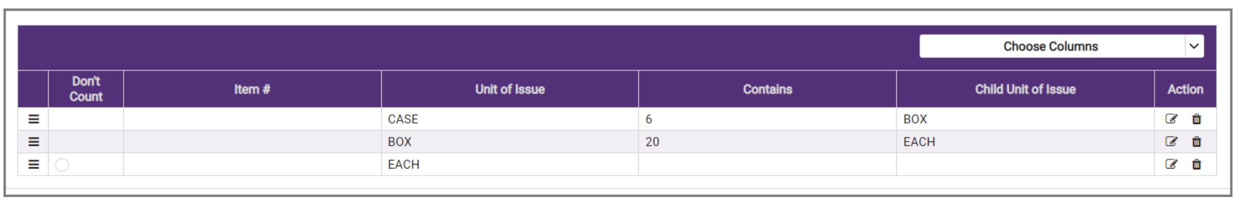
27. Click + Add Unit of Issue

28. Repeat for box and for case UOI:





The added **Unit of Issue** will appear in a table at the bottom of the screen:



	Don't Count	Item #	Unit of Issue	Contains	Child Unit of Issue	Action
≡			CASE	6	BOX	
≡			BOX	20	EACH	
≡			EACH			

Unit of Issue Choices include: Ampule, Auto-Injector, Bag, Blister Pack, Bottle, Bottle Pump, Bottle Spray, Bottle Unit-Dose, Box, Bundle, Canister, Capsule, Carton, Cartridge, Case, Each, Inhaler, Inhaler Nasal, Kit, Pack, Package, Packet, Pair, Pallet, Pill, Pouch, Ream, Roll, Sheet, Syringe, Syringe Pre-Filled, Tablet, Tray, Tube, Vial, Vial Multi-Dose, Vial Pharmacy Bulk Package, and Vial Single-Dose.

Items Serialized All items that need to be individually tracked should be serialized. Checking this box will make the serial number a required field for this item. This is mainly for Durable Medical Equipment, High-value items, items that require routine or individual maintenance or inspections, and some pharmaceuticals, would typically be serialized. Examples of serialized items: ventilators, data loggers, vaccines, kits, oxygen concentrators etc. The quantity received for a unit of issue that is tracked by serial number is always 1. For items that might not have a serial number, like a first aid kit, but require individual tracking, a user created serial # should be used. For example: ALB-906-001 (Albany county-item number 906-kit 001).

GTIN Global Trade Item Number is a worldwide unique identification number (8, 12, 13, or 14 digits), provided by the manufacturer for an item. Each unit of issue can have a different GTIN, so the number on the case can be different. GTIN is used as a cross-reference and will be used for future barcode scanning functionality.

29. The added **Unit of Issue** can be edited or deleted from the table by selecting an icon in the **Action** column.

Choose Columns

	Don't Count	Item #	Unit of Issue	Contains	Child Unit of Issue	Action
≡			CASE	6	BOX	
≡			BOX	20	EACH	
≡			EACH			

The **Item #** column is blank in the table, because item numbers will be assigned to each **Unit of Issue** when the Add Item request is approved.

30. After all Units of Issue have been added to the requested Item, click the Request Add button.
31. The **Manage Items** search screen returns displaying a success message:

    Success : Request for Item (Item Name) has been submitted.

32. Check your email for confirmation that your requested item has been submitted:

MERITS Add New Item Request Submitted

D donotreply@health.ny.gov
To Requestor

Your request to Add the new Item Test Request Item to MERITS has been submitted.

To view details regarding this Item, log into the Health Commerce System (HCS) then select the MERITS application and in Item Management search for Pending Approval Items.

If you have questions regarding this email, please contact the Office of Health Preparedness at merits@health.ny.gov.

The MERITS Team

The MERITS State Admins will receive a New Item Request email from your county with the requestor's contact information.

MERITS Add New Item Request from Albany County

D donotreply@health.ny.gov
To merits@health.ny.gov

A request to Add the new MERITS Item Test Request Item has been submitted by Albany County, Requestor Name, Email and Phone Number

Look for your requested item by running a new search and select **Yes** for **Pending Approval Items.** Your requested item will appear in the Search Results.

You may update your requested item (**Request Update**) or **Cancel Request**:

Manage Items

Request Add Item

Master Item test request .5 kg (Abco) [BOX] [(100) BOTTLE] [(30) CAPSULE]

Unit of Issue for Item test request

Request Update Cancel Request

You will receive an email when Add New Item Request is Approved:

MERITS Add New Item Request Approved

D donotreply@health.ny.gov
To Requestor

Your request to Add the Item TEST has been Approved.

To view details regarding this Item, log into the Health Commerce System (HCS) then select the MERITS application and in Item M

If you have questions regarding this email, please contact: Office of Health Preparedness, at merits@health.ny.gov .

The MERITS Team

You will receive an email Add New Item Request is has been declined:

MERITS Add New Item Request Declined

D donotreply@health.ny.gov
To Requestor

Your request to Add Item Duck Tape Orange has been Declined for the following reason: Item already exists .

If you have questions regarding this email, please contact: Office of Health Preparedness, at merits@health.ny.gov .

The MERITS Team

TIPS:

- For more information about a label click the info icon
- When you search for an item using the keywords, the search criteria entered will look for a match in either the **Item Name** or the **Keywords** field.
- Search by item number will also return all item numbers associated with that item's other **Unit of Issue, if you search for item# 177 (Doxycycline) you will see item#178 and #2898, other units of issue associated with #177.**
- Future application enhancements may include a module for creating your own item catalog for your county's use only.
- If you are not certain if an item should be serialized or not, then add a comment to your request because item cannot be converted to a serialized item later.

This scenario demonstrates how to search for an item to determine if a new item request is warranted, and then how to request an item properly.

Notes:

TRAINING SCENARIO 5: INPUT EXISTING INVENTORY INTO MERITS (ON HAND INVENTORY NOT IN MY INVENTORY)

After reviewing your existing inventory and counts from **My Inventory** (Training Scenario 1), you discover there is no record of a particular item stored at your site. You have already verified the item exists in **Item Management** (Training Scenario 4).

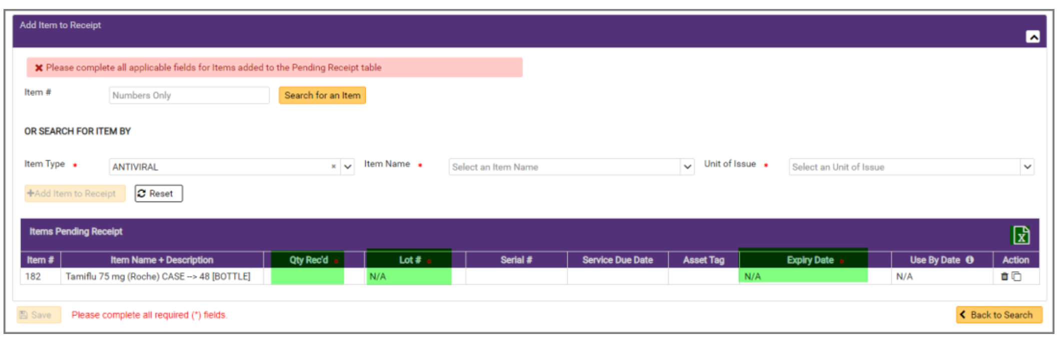
In other words, you need to create a receipt without a PO.

1. Click **Manage Items > Manage Orders >Receive Items** (left navigation panel)
2. Click **+ Create Receipt** (top right)
3. Skip External PO #, Requisition # or NY Responds #, if not known
4. Select **Maintenance** from the Vendor list OR select the **Vendor,** if known
    a. Leave the Vender Contact information blank if it does not prefill.
5. Select **Receiving Site Type** and **Receiving Site Name & Address**
6. Select **Funding Source** and **Event** (if known)
7. Skip Funding Line (State use only) and Estimated Delivery Date
8. Enter **Special Instructions** to be included on the receipt and saved in transaction history, e.g., found in back stock room, or initial receiving of items in warehouse, etc.

9. In the Add Item to Receipt section, Enter **Item #** and click **Search for an item.**

    or select **Item Type** > **Item Name** > **Unit of Issue**

10. Find the correct item and click +Add Item to Receipt
11. Message: Please complete all applicable fields for Items added to the Pending Receipt table will display:

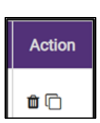


    From the **Items Pending Receipt** table, enter:
    a. Quantity Received (click in box)
    b. Lot #, Expiry Date and Use by Date are prefilled with N/A. Click in each text box to select a date.
    c. Serial #, Service Due Date, and Asset Tag are entered when applicable for the Item.

12. Click **Save** to create the receipt and add items to **My Inventory**

13. The system will assign an Order number to the Receipt and mark the Order closed. This success message will display: **Success:** Successfully Closed Order Number (2023-00283)

TIPS:

- From **Action** 

  column, the icons can be used to remove the item from the **Items Pending Receipt** table, or to copy that row to the Pending table.

- Repeat steps 7 thru 10 for each item to be received.
- All items received into MERITS are assigned the Location of 000-000-000 at the Receiving Site until the location is updated.
- The option **Manage Inventory** > **Move Inventory** is where you change the location of inventory within a site.
- Being familiar with Manage Items' **Item #** and **Item Types** will be helpful in managing your own inventory.
- Request an Item (Training Scenario 4) as needed.
- Try not to confuse **Manage Inventory** (what inventory is available at a site) with **Manage Items** (what items are available in MERITS to be placed on order to be put into inventory)
- Use By Date must be greater than or equal to the Expiry Date

This scenario demonstrates how to successfully input existing inventory into MERITS, aka Maintenance.

Notes:

TRAINING SCENARIO 6: RECEIVE INVENTORY FROM NYSDOH/MERC

NYSDOH has just sent you an email that your county will be receiving inventory to address a public health emergency. You are required to manage and track this inventory. Note: – the site contacts at the receiving site will have received an email from donotreply@health.ny.gov with order details, the issuing site will be copied on the email so you can reply if needed.

As the receiver of these items, you need to physically take the order in, inspect and verify the order for accuracy, and then receive the items into MERITS.

Note: This process is the same when receiving items from another County DOH.

Sample of Issue Order Shipped (email attachment from donotreply@health.ny.gov)

Note: the email contains the contact information of the issuing site, including email addresses (of the primary contact). Also, there is a link that will take you straight to MERITS to receive the order.

MERITS Issue Order shipped:

MERITS Issue Order # 2024-00337 was shipped by the Issuing Site ALBANY COUNTY (MERC/RSS SITE).

For questions about this order, contact Rob Tinney (518) 857-6190/(518) 861-8569, nysmerc@health.ny.gov (OR) Jeff E Ballard (518) 860-0243/(518) 861-8569.

To receive this Issue Order into your MERITS Inventory, log into the Health Commerce System (HCS).

Order Details:

MERITS Issue Order # 2024-00337 **Shipped:** Dec 2, 2024 **Shipping Method:** FED EX **Tracking Number:**

Issuing Site Type: MERC & RSS SITE

Issuing Site: ALBANY COUNTY (MERC/RSS SITE), 28B VANBUREN BLVD NORTHEASTERN INDUSTRIAL PARK, GUILDERLAND CENTER, NY, 12085

Delivery Site Type: COUNTY

Delivery Site: PUBLIC HEALTH, 417 LIBERTY STREET, PENN YAN, NY, 14527

Special Instructions: Order Options=None

Driver Information:

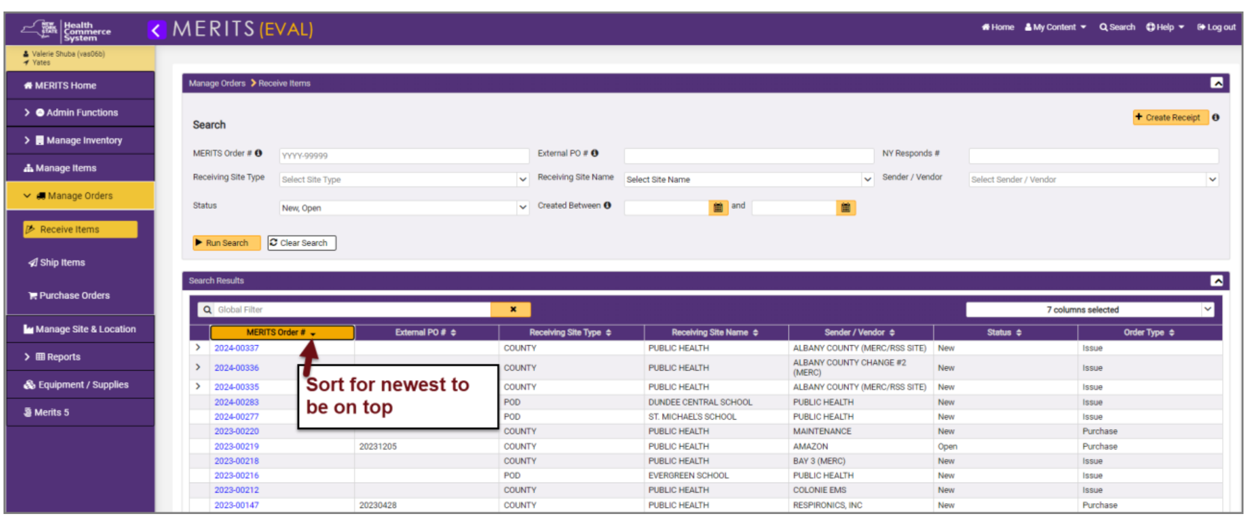
Name:

Cell: **License Plate:** **Vehicle Details:**

Items in this order:

Item #	Item Name + Description	Qty Issued	NDC #	Lot #	Serial #	Expiry Date
5385	Syringe w/Needle Tuberculin 25g x 5/8 1ml (Exelint) [BOX] [(10) PACK] [(10) EA]	10		210401		Mar 31, 2026
5409	Air Purifier, HealthMate [EA]	1		N/A	969601	N/A

1. Click **Manage Orders** > **Receive Items**
    a. The system will automatically run a search of all new and open orders to be received into your inventory.
    b. The Sender / Vendor will identify who the assets are from. All items sent from the MERC are Issue Order Type. Orders coming in from a site you own are Transfers.



2. From Search Results click the **>** to display the order's contents

⌄	2023-00104		COUNTY	PUBLIC HEALTH	ALBANY COUNTY (MERC/RSS SITE)	New	Issue

Item #	Item Name + Description	Qty Issued	Qty Rec'd	Qty Outstanding	Notes
104	Bandaid 3/4 x 3 (Moore Medical) [CASE] [(12) BOX] [(100) EA]	10	0	10	
116	Filter Combo HME-HEPA PEDIATRIC (King Systems) [CASE] [(50) EA]	12	0	12	
4757	Ventilator VG70 (AEONMED) [EA]	1	0	1	

Total Records: 3 · 1 · Records Per Page: 25

	MERITS Order #
>	2023-00010
>	2023-00011
⌄	2023-00104

3. Click the 'MERITS Order Number' to view the order details
4. Click **Worksheet** to download a copy of the order to verify items being received:

MERITS RECEIPT WORKSHEET				
Order Type	Issue	**NY Responds #**		MERITS Order
Event	vas06 Nov 2024 IMS Test	**External PO #**		
Order Created Date	12-02-2024	**Created By**	SYSTEM (SYSTEM)	2024-00337

Shipper Information	
Issuer Name	ALBANY COUNTY (MERC/RSS SITE)
Issuer Contact	Rob Tinney **Phone:** (518) 857-6190 **Email:** nysmerc@health.ny.gov
Delivery Information	
Delivery Site Type	COUNTY
Delivery Site	PUBLIC HEALTH **Address:** 417 LIBERTY STREET PENN YAN NY 14527

Items Received

Line #	Item #	Item Name + Description	Qty Rec'd	Lot #	Serial #	Expiry Date	Notes	Put-away Location

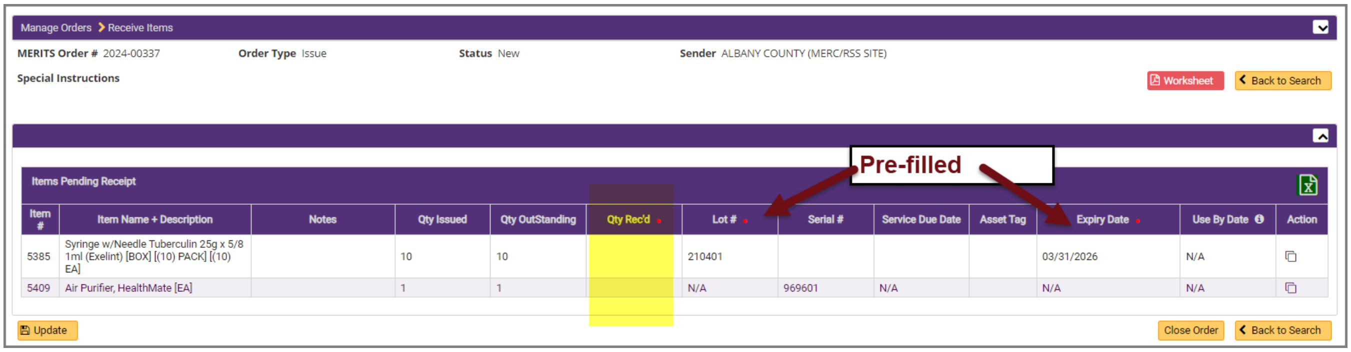
Items Pending Receipt

Line #	Item #	Item Name + Description	Qty Rec'd	Lot #	Serial #	Expiry Date	Notes	Put-away Location
	5385	Syringe w/Needle Tuberculin 25g x 5/8 1ml (Exelint) [BOX] [(10) PACK] [(10) EA]						
	5409	Air Purifier, HealthMate [EA]						

Received By (Print Name)	Signature	Date

Generated at: 12-02-2024 13:54 · MERITS Order # 2024-00337 · Page 1 of 1

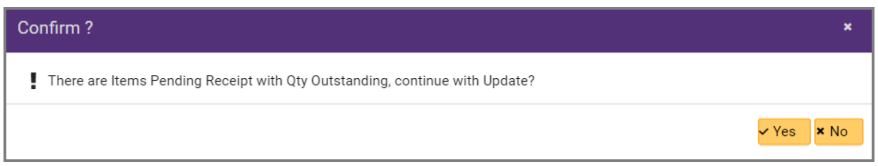
5. Enter Quantity Received, and Lot # and Expiry Date if not complete.



6. Click **Update**

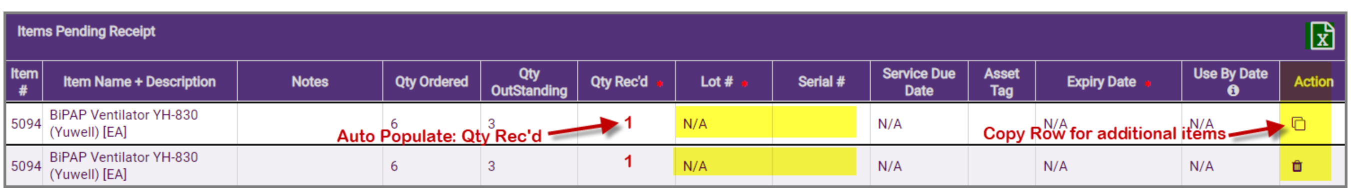
7. Verify **Success:** Successfully Updated Order Number (2023-00104)

If not, all items are received, then confirm some items are still pending:



TIPS:

- Orders are either New, Open (pending receipt of items) or closed.
- Order Types are Issue, Purchase, or Transfer (assets from a site manage inventory for aka own)
- Serialized items, such a kit, ventilators or BiPAP machines, must have a **Qty Rec'd** of one to accommodate the unique Serial or Lot number. MERITS will autofill the quantity once the Serial or Lot Number is added to the item.
- If an order has more than one serialized item, then Copy Row (see **Action** column) for each additional item. This will allow you to enter the unique Serial or Lot Number for each.



This training scenario demonstrates how your facility can process an order from the MERC or another County Health Department.

Notes:

TRAINING SCENARIO 7: CREATE PURCHASE ORDER (PO)

A PO creates a pending order that can easily be received in MERITS. The Order Type is Purchase.

Your county has a purchase order for Tamiflu, and you want to enter it into **My Inventory.** You already searched **Item Management** and identified the item as 182: Tamiflu 75 mg (Item Type: Antiviral from Roche) Case [48 Bottles] [10 Pills per bottle]. The PO is for one case or 480 pills.

1. Click **Manage Orders** > **Purchase Orders** (left panel)
2. Click **+ Create Purchase Order** (top right)
3. Enter External PO #, Requisition #, NY Responds # (optional)
4. Select **Vendor Name** (if not listed, then add the vendor in Manage Site & Location)
    a. For items already at the site, you selected **Maintenance** (Training Scenario 5) for vendor.
    b. Vendor Contact, Phone & Email will pre-populate after the Vendor Name is selected. Any missing data won't appear in a field.
5. Select **Receiving Site Type** and **Name** & **Address** and **Funding Source**
6. Select **Event, Funding Line, Estimated Delivery Date**, and **Special Instructions** (optional)
7. Special Instructions will be displayed in the MERITS Receipt Worksheet under **Delivery Information**
8. Enter either the **Item #**

    or

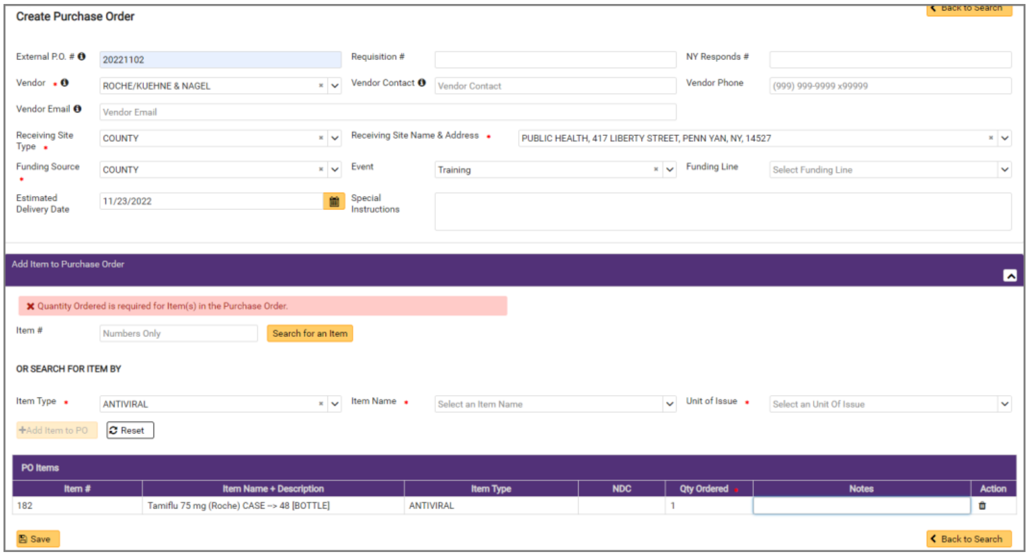
    select **Item Type** "Antiviral" > **Item Name** "Tamiflu" > and a Unit of Issue CASE → 48[Bottle]
9. Click **+Add Item to PO**
    a. The NDC will prefill if it exists in MERITS in Item Management, otherwise leave it blank. Entering NA or N/A isn't required.
10. Enter 

11. Enter any notes about receiving the item. The notes will be displayed in the MERITS Receipt **Worksheet** in Items Pending Receipt and Items Received
12. Click **Save**
13. Verify Success: Successfully created Order (example 2023-00277)

TIPS:

- Adding vendor contact information to the PO, will not update the master record in Site Management, but it can be very helpful. Adding a specific contact/salesperson to your purchase order allows for you and other users in the system to know who is handling your specific order without having to change the vendor's contact info in Site Management each time.
- Funding Source is an important feature of MERITS that most systems don't have. The intent of Funding Source is to differentiate between products that might have been purchased off a specific grant or with a specific population in mind. This can become very important when it comes to reimbursements and running various reports. Examples are as simple as tracking products supplied by federal partners, or a grant that might be specific to supporting certain populations (like uninsured or under-insured populations). You can generate reports showing that the product from that grant was sent indeed used for the specific population.
- Special Instructions can be used to provide general instructions to the person receiving the shipment. For example: Please notify the clinic as soon as shipment arrives and check for damage. This product is for the POD and should be sent over ASAP.
- At this time, county users cannot create their own Events, but will have the ability in the future.
- Funding Line is for State use only – it allows for more granular financial tracking.
- Notes about receiving an item is not the same as inventory comments. This note is specific to the item received. It is intended for the person putting in the PO to leave a note for the person receiving the product. Something like Receive by Serial number, check units for damage, bring to labs immediately when received, etc. are examples of item notes.

.
If you know the **Item #**, then step 8 is simplified so it may be beneficial to search **Manage Items** first.



This scenario demonstrates how to add a PO to MERITS.

Notes:

____

____

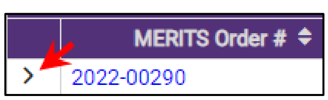
____

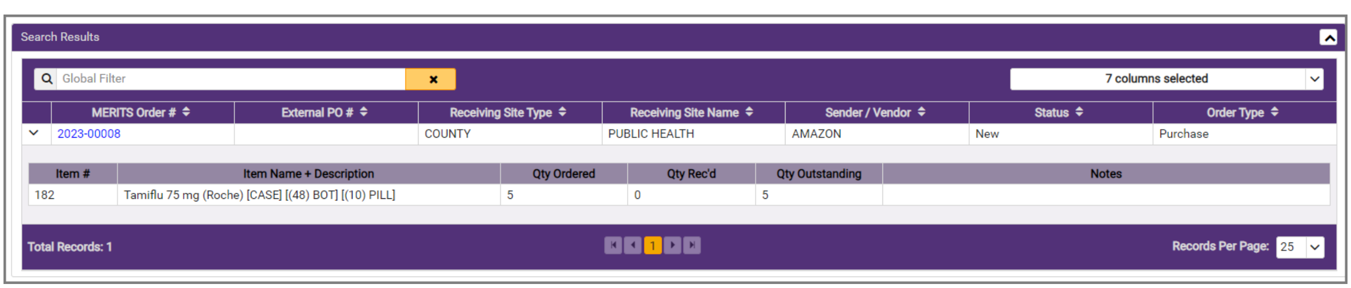
____

TRAINING SCENARIO 8: RECEIVE PURCHASE ORDER (PO)

The PO you placed in previous training scenario has arrived and you want to receive the Tamiflu into **My Inventory**.

1. Click **Manage Orders > Receive Items** - a search for all new and open POs will run automatically.
2. In **Search Results**, use the Global Filter to search for your PO # or scroll down the list to locate the **MERITS Order #**
3. Click **>** to view items on order

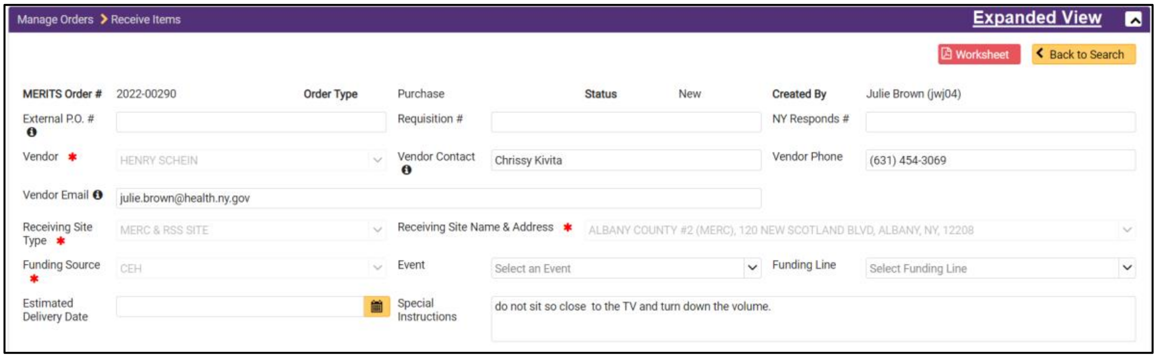




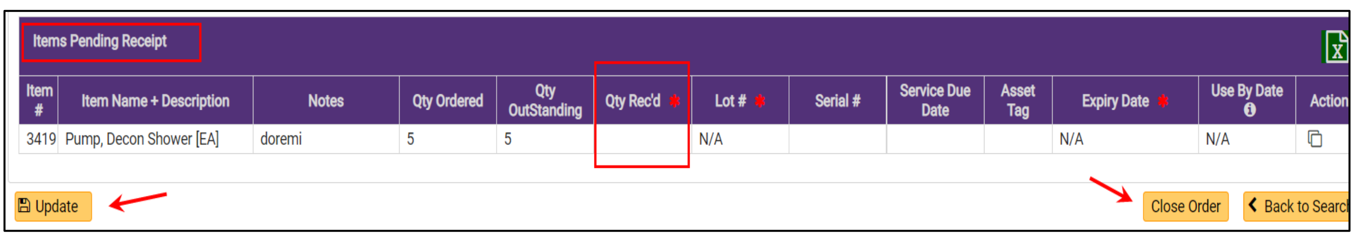
4. Click the **Order #** to view/update the order.

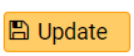
a. Print the order **Worksheet** if needed to verify what is delivered. Can also be used to file with paperwork in hard copy file.

b. Expand the top section by clicking on down caret in the upper right corner to review or edit:



5. Enter **Qty Rec'd** in **Items Pending Receipt** for each item listed. Note: **Qty Rec'd** amount can be less than or greater than the **Qty Ordered**
   a. If applicable, enter a Lot #, Expiry Date and Use By Date or leave as N/A
   b. If item is prepopulated with a Serial #, the columns for Service Due Date and Asset Tag can be edited (Purchase Orders will not be prepopulated serial numbers, prepopulated serial numbers would only happen on a receipt for item shipped from one MERITS inventory to another MERITS inventory, example, state to county or county to county.
   c. The column **Action** contains a copy icon which is used to copy that row.



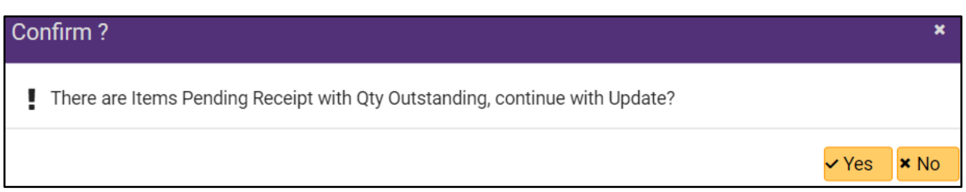
6. Click 

7. Confirm message: **Success:** Successfully Closed Order Number (2023-00008

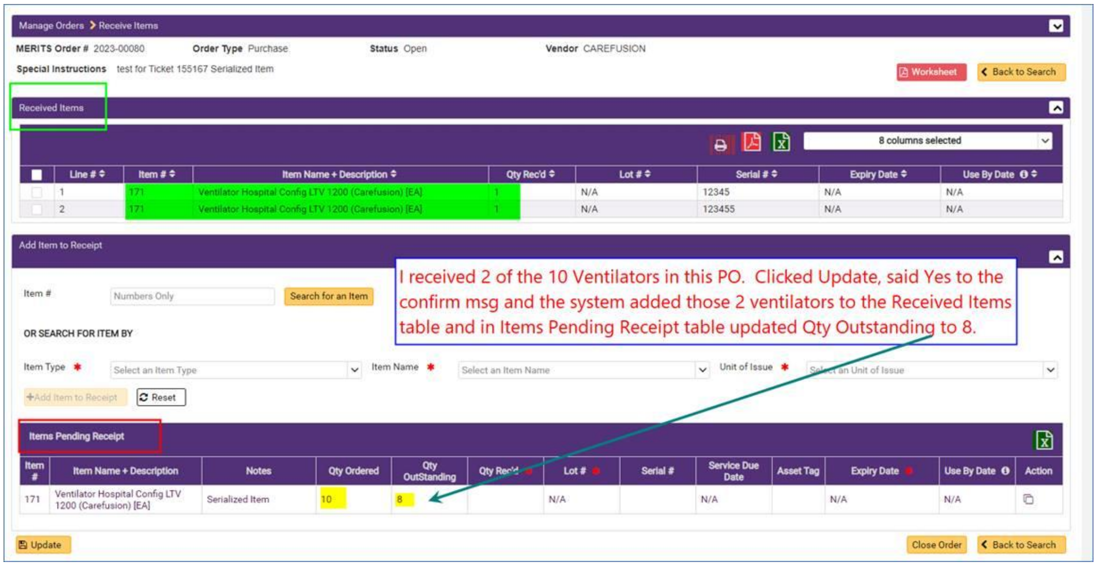
TIPS:

- Use the copy icon in the Action column to split the row/line. This will allow you to access the Receive button for items with multiple lot numbers or for serialized items. Serialized items must be received in quantities of one. MERITS will systematically populate the one (1) in quantity, but you can copy the line to enter a different serial number for each item.

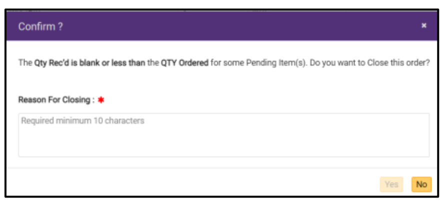
- This confirmation window displays if the Qty Rec'd is blank for any item(s) of the pending receipt:



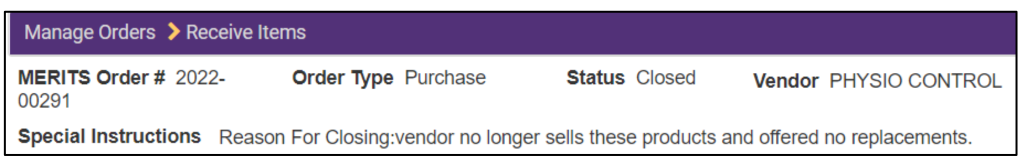
- When the **Qty Rec'd** amount is equal to or greater than **Qty Ordered** then clicking **Update** will change the status of the PO to closed for the items received. Items not received are listed in the Items Pending Receipt table (verses the Received Items table).



- To close an open PO before all items are received click **Close Order**. A confirmation window will display. Click **No** to cancel Close Order or enter the required reason for closing the order and click **Yes**. Confirm the order is closed message displays:



- The reason for closing text will appear in the closed order's Special Instructions field:



In other words, Closing the Order does not mark the items received.

- Use **Add Items to Receipt** to add more items to the PO. Note: Only the Qty Rec'd can be entered when adding items using the **Receive Items** option

This scenario demonstrates how to receive assets on a purchase order.

Notes:

___

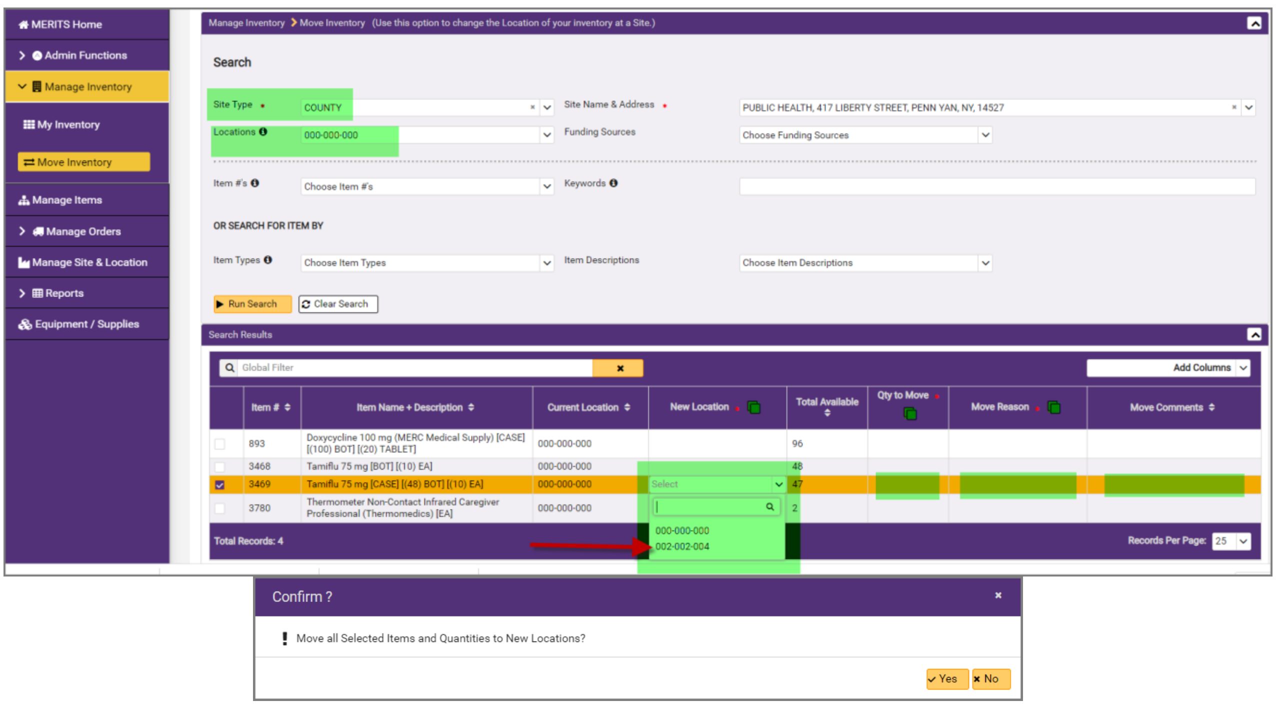
___

___

Training Scenario 9: Update Inventory Location

Your Master Inventory displays that your purchase order has been received, but the item has been moved from the loading dock to the storage area. You need to update the location info for the order. You have already identified the Room – Shelf – Bin as 002-002-004 (Training Scenario 3).

1. Click **Manage Inventory > Move Inventory**
2. Select **Site Type > Site Name & Address**
3. Select the current location (000-000-000), or enter **Item #** or **Keyword**, or select **Item Type**, etc.
4. Click **Run Search**
5. Check the box corresponding to the **Item #, Name + Description** in search the results.
6. Click New Location to select **New Location**: 002-002-004
7. Enter **Quantity to Move**
8. Select **Reason** (PUTAWAY, RELOCATE, OTHER)
9. Enter **Comments** (optional)
10. Click **Move Items to New Locations**
11. Confirm Yes or No to: **Move all Selected Items and Quantities to New Locations?**
12. Confirm: **Success:** Successfully moved selected Items to New Locations



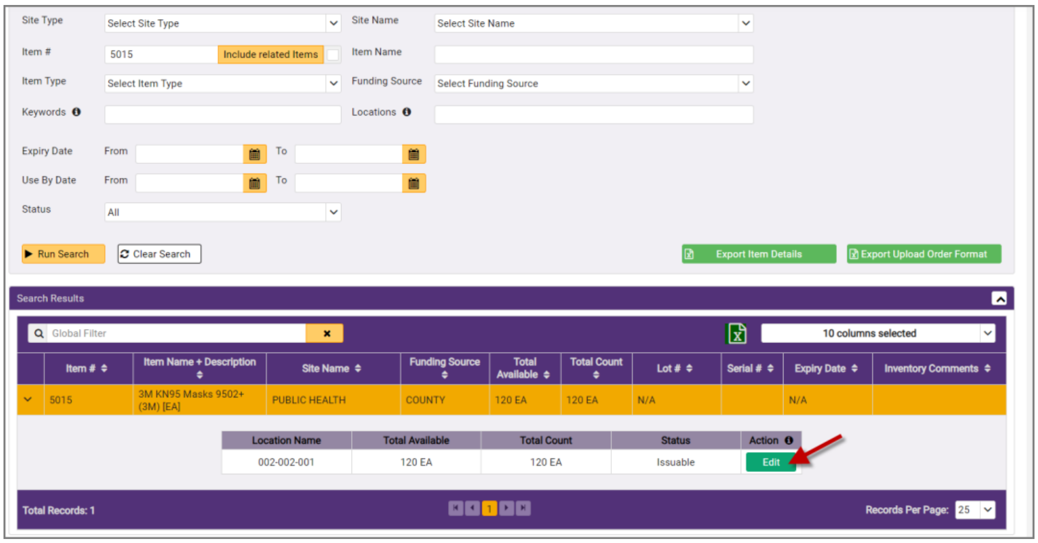
This training scenario demonstrates how to update the location of an asset in MERITS.

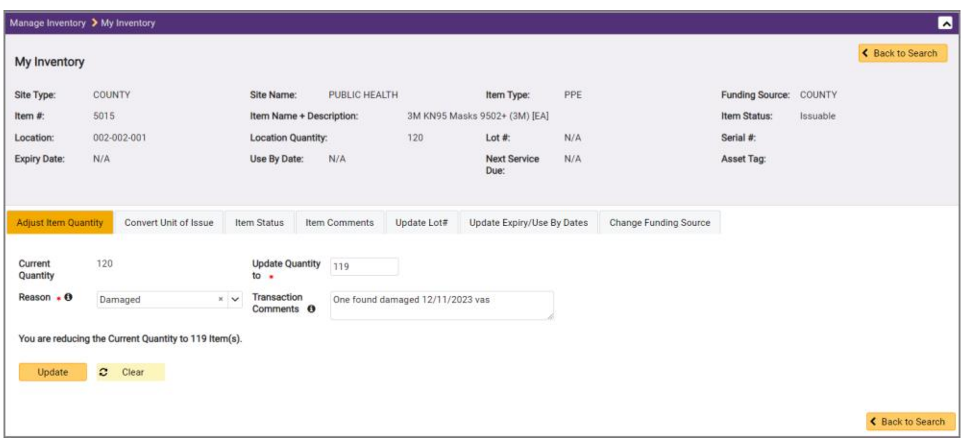
Notes:

TRAINING SCENARIO 10: ADJUST INVENTORY

You have taken a physical inventory and noticed that the mask count is off (Item # 5015 3M KN95 Masks 9502+ (3M) [EA], therefore you want to adjust the inventory so, **My Inventory** reflects the correct # of cases.

1. Click **Manage Inventory** > **My Inventory**
2. Select search criteria to find item #
3. Click **>** for item.
4. Click **Edit**
5. Under **Adjust Item Quantity** tab, select **Update Quantity to** (if Current Quantity is greater than 1)
6. Select **Reason** and enter **Transaction Comments.** Comments are optional but highly suggested, such as why adjustment was done, any information about the adjustment, example, damage due to shipping.
7. Click **Update**
8. **Confirm message:**
   Success: Successfully adjusted the Item Quantity for Item # 5015





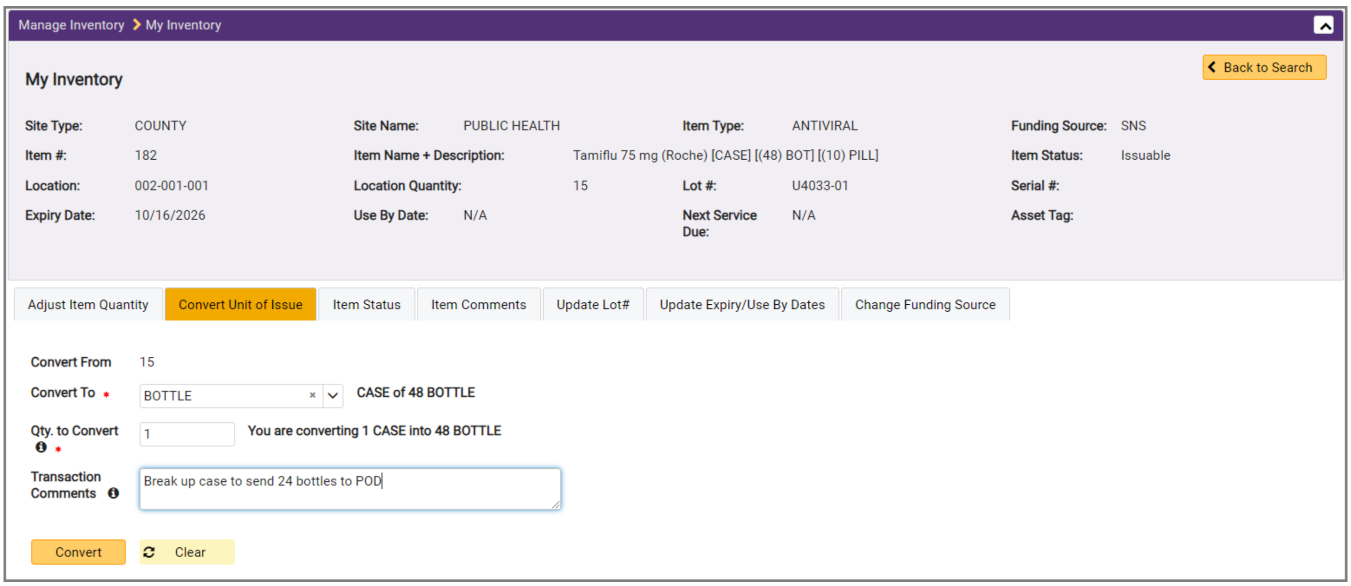
This training scenario demonstrates how to adjust your inventory totals.

Notes:

TRAINING SCENARIO 11: CONVERT INVENTORY TO A SMALLER UNIT OF MEASURE

You have cases of Tamiflu in inventory, and two POD locations need to split one case (24 bottles each). Convert one case of Tamiflu into bottles.

1. Click **Manage Inventory** > **My Inventory**
2. Select **Site Type** and **Site Name**
3. Enter **Item #**
4. Click **>** for item.
5. Click **Edit** for item at location you want to split case from
6. Select the **Convert Unit of Issue** tab.
7. Note **Convert From** quantity – this is how many you have in inventory.
8. Enter **Quantity to Convert** (how many cases do you want to break up into smaller units)
9. Enter **Transaction Comments** (optional – but helpful)
10. Click **Convert**
11. Verify **Success:** Successfully converted the Unit of issue for Item # 3469 to Item # 3468 Verify at My Inventory screen.



TIPS:

- If you are converting to a smaller quantity, the **Qty to Convert** must be smaller than the total shown in the **Location Quantity**
- This is rare, but if you are converting to a larger quantity, then the Qty to Convert will be less than or equal to the **Location Quantity** times units in the parent unit (Parent is the top-level Unit of Issue and is the largest possible packaging type for a specific item)

This scenario demonstrates how to break down inventory units using MERITS to maintain proper inventory levels.

Notes:

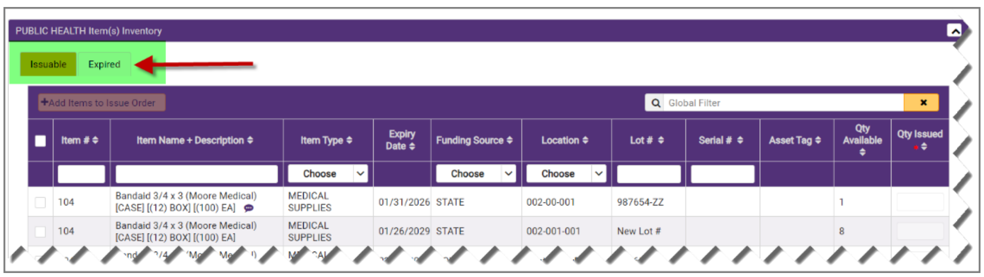
TRAINING SCENARIO 12: SHIP AN ORDER

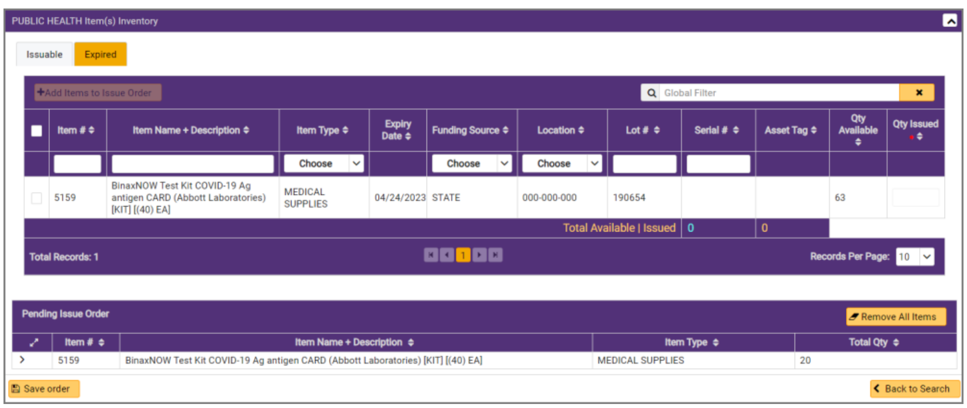
An announcement has been made that the two POD sites within your county will be opening tomorrow at 8:00 am. You need to start sending items to each site. In this scenario, you will be creating an issue order, picking the items, and then shipping them.

Check to be sure the two POD Sites are active (Training Scenario 2), and 24 bottles of Tamiflu (item # 183) are available to send to each location.

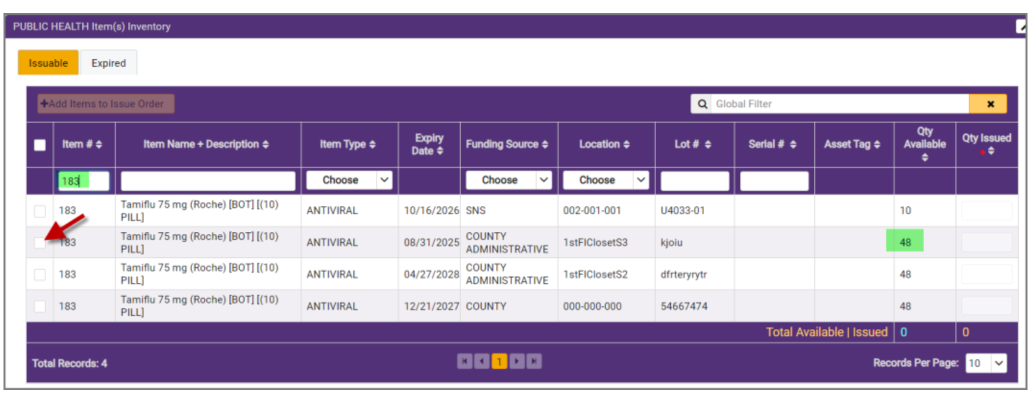
This is a three-step process:

I. **Create a Pick Sheet**
   1. Click **Manage Orders** > **Ship Items > + Create Issue Order** (Pick Sheet)
   2. Select **Event**
   3. Select **Sender Site Type** > **Sender Site Name & Address**
   4. Select **Delivery Site Type** > **Delivery Site Name & Address**
   5. **Send Email to Delivery Site** is checked by default.
   6. Change **Other Order Options** as needed.
      a. **None** (default triggered by delivery site type selected), **Auto Receive** or **Not Tracked at Delivery Site**
   7. Enter **Special Instructions** (will appear in the delivery sheets)
   8. Select **Issuable** or **Expired Tab**





   9. Check **Item #, Name** and **Description –** filter list, as needed, to find correct item.



10. Click **+Add Items to Issue Order**
11. View **Pending Issue Order** detail. Note the ability to **Remove All Items** from the order as needed.
12. **Save Order**

Pending Issue Order — Remove All Items

	Item #	Item Name + Description	Item Type	Total Qty
>	183	Tamiflu 75 mg (Roche) [BOT] [(10) PILL]	ANTIVIRAL	24

Save order — Back to Search

Confirm: **Success:** Successfully Saved the Order Number (2023-00010)

13. Both the sender and delivery site contacts receive an email that MERITS Issue Order is created:

MERITS Issue Order # 2022-00003 was Created

donotreply@health.ny.gov
To
Cc

Reply | Reply All | Forward | ...
Mon 12/19/2022 12:24 PM

MERITS Issue Order created:

MERITS Issue Order # 2022-00003 was created by the Issuing Site BAY 3 (MERC).

For questions about this order, contact Senders Name, email and phone

Order Details:

MERITS Issue Order # 2022-00003 **Created:** Dec 19, 2022

Issuing Site Type: MERC & RSS SITE

Issuing Site: BAY 3 (MERC), NORTHEASTERN INDUSTRIAL PARK BUILDING 10 BAY 3, GUILDERLAND CENTER, NY, 12085

Delivery Site Type: FORWARD DEPLOY

Delivery Site: UNITY HOSPITAL, 1555 LONG POND ROAD, ROCHESTER, NY, 14626

Special Instructions: changed Other Order Options from default Auto Receive to None so can use Receive Items option for this order

Items in this order:

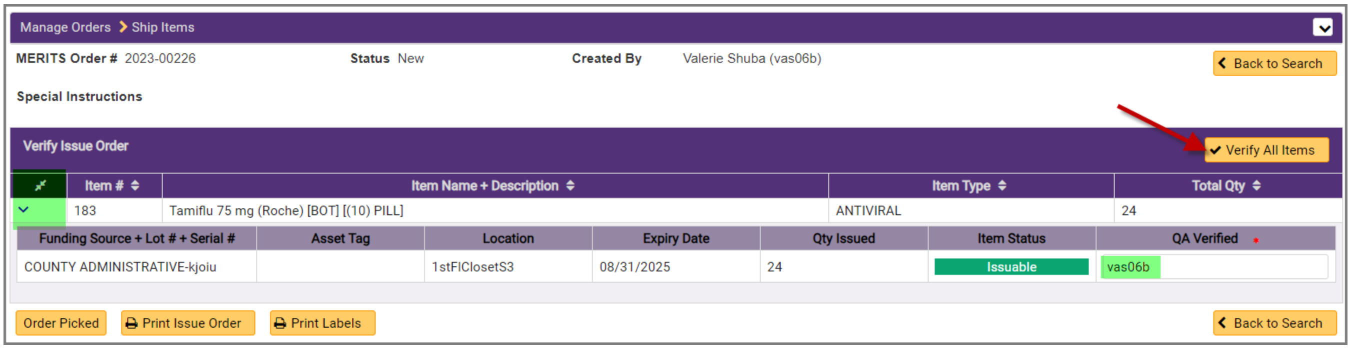
Item #	Item Name + Description	Qty Issued	NDC #	Lot #	Serial #	Expiry Date
5159	BinaxNOW Test Kit COVID-19 Ag antigen CARD (Abbott Laboratories) [KIT] [(40) EA]	85		188603		Apr 12, 2023
5159	BinaxNOW Test Kit COVID-19 Ag antigen CARD (Abbott Laboratories) [KIT] [(40) EA]	386		185269		Nov 27, 2022
5232	Bag Biohazard Specimen 8 x 10 (Uline) [ROLL] [(100) EA]	100		N/A		N/A
5253	IDNow Machine (Abbott Laboratories) [EA]	1		544DD91C		N/A
5253	IDNow Machine (Abbott Laboratories) [EA]	1		41A8D91C		N/A
5253	IDNow Machine (Abbott Laboratories) [EA]	1		3640D91C		N/A
5263	Swab NP Disposable 15cm w/ 8cm breakpoint [BOX] [(100) EA]	63		041820		Mar 31, 2023
5272	Swab NP Disposable PurFlock Sterile Ultra Tip 150 mm w/ 100 mm breakpoint (Puritan Medical) [BOX] [(1000) EA]	5		7901		Nov 1, 2025

II. Pick an Issue Order

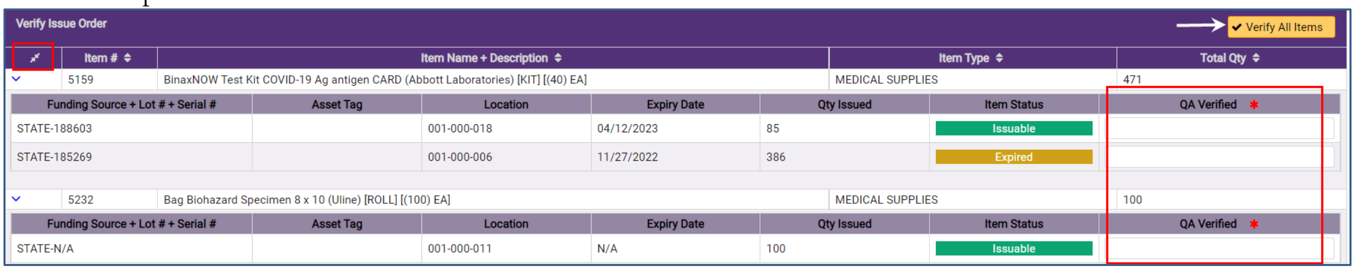
1. Continue or click **Manage Orders** > **Ship Items**
2. View **Results Table** - search runs automatically for new and picked orders.
3. From the **Action** column click Pick for the Order #
4. On the next screen, in the **Ship Items' Verify Issue Order** table click ⤢ to view each item # details.
   a. Clicking ✔ Verify All Items enters your HCS User ID into QA Verified * for all items.

   b. OR enter text into **QA Verified** for the first item, then click ✔ Verify All Items and text will be copied to the rest of the items.

   c. Entries to the column QA Verified * can be edited before clicking Order Picked



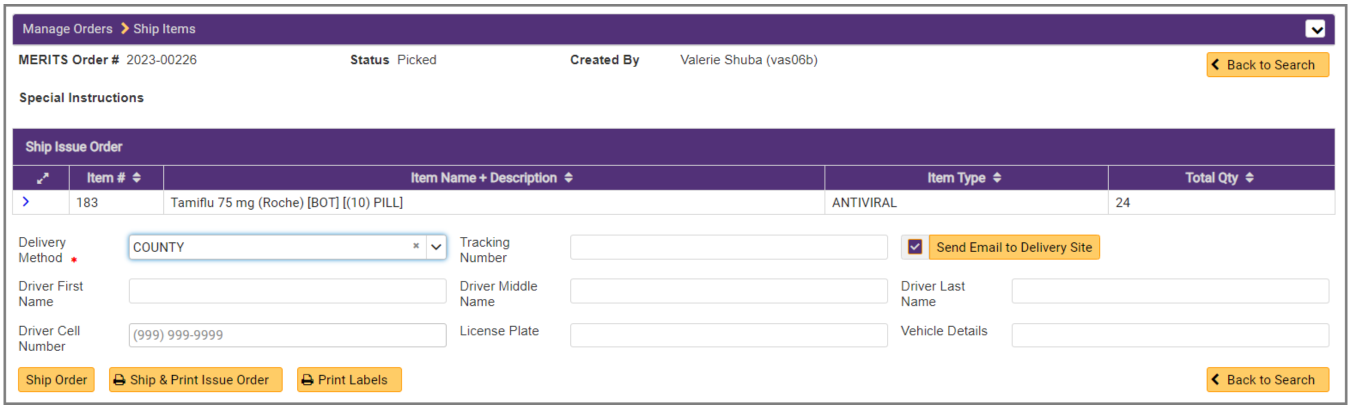
Or for multiple items:



5. Click **Print Labels** (optional)
6. Click **Order Picked**
7. Confirm message **Success: Successfully verified all Items in Order Number (YYYY-XXXXX) and the order is ready to Ship.**

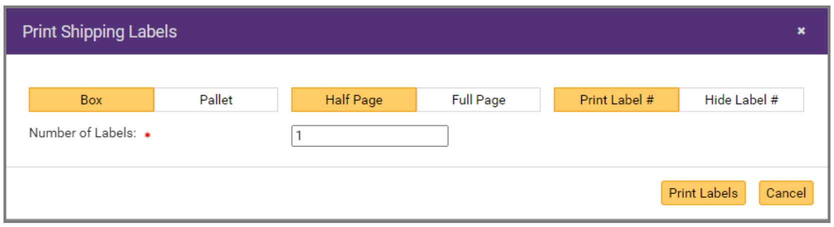
III. Ship an Issue Order

1. Continue or click **Manage Orders** > **Ship Orders**
2. View **Search Results** table - search runs automatically.
3. Click **Ship** from **Action** column for the applicable order.
4. Select a **Delivery Method**: Combination, County, DOCS, Fed Ex, MERC/SNS, NA, OGS, OGS/DOCS, Other, UPS or USPS
5. Enter Tracking Number, Driver's First, Middle, Last Name, Cell Number, License Plate, and Vehicle Details (optional)
6. **Send Email to Delivery Site** is checked by default.
7. Click **Print Labels** (if needed) to print the shipping labels or click **Ship & Print Issue Order** or **Ship** (without printing or downloading the four-page pdf)
    a. Click **Ship Order** to change the status to Shipped and return to **Manage Orders > Ship Orders** screen.
    b. Click **Ship & Print Issue Order** to change the status and generate the four-page **Issue Order PDF**

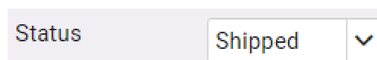


8. Confirm message **Success: Successfully Shipped Order Number (YYYY-XXXXX)**

Print Shipping Label Options:



TIPS:

- To search for a shipped order, change the status to 

- The **Issue Order PDF** includes four copies:
  1. **Issuer/Inventory Control** - for records and reconciling orders.
  2. **Pick Sheet –** indicates the item was picked and verified. Return to inventory control when complete.
  3. **Delivery Receipt –** Obtain signature when delivered and return to Issuing site.
  4. **Recipient Copy**
- After delivery is complete, the (1) Inventory Control, (2) Pick Sheet (3) Delivery Receipt are to be clipped together as the paper backup.
- When shipping an order, the system determines whether the item is being shipped to a disposal site or not. The user only needs to select the site type when creating the order.

This scenario demonstrates how to properly create an issue order (i.e., create the pick sheets), pull the inventory from storage (pick), and then ship the order.

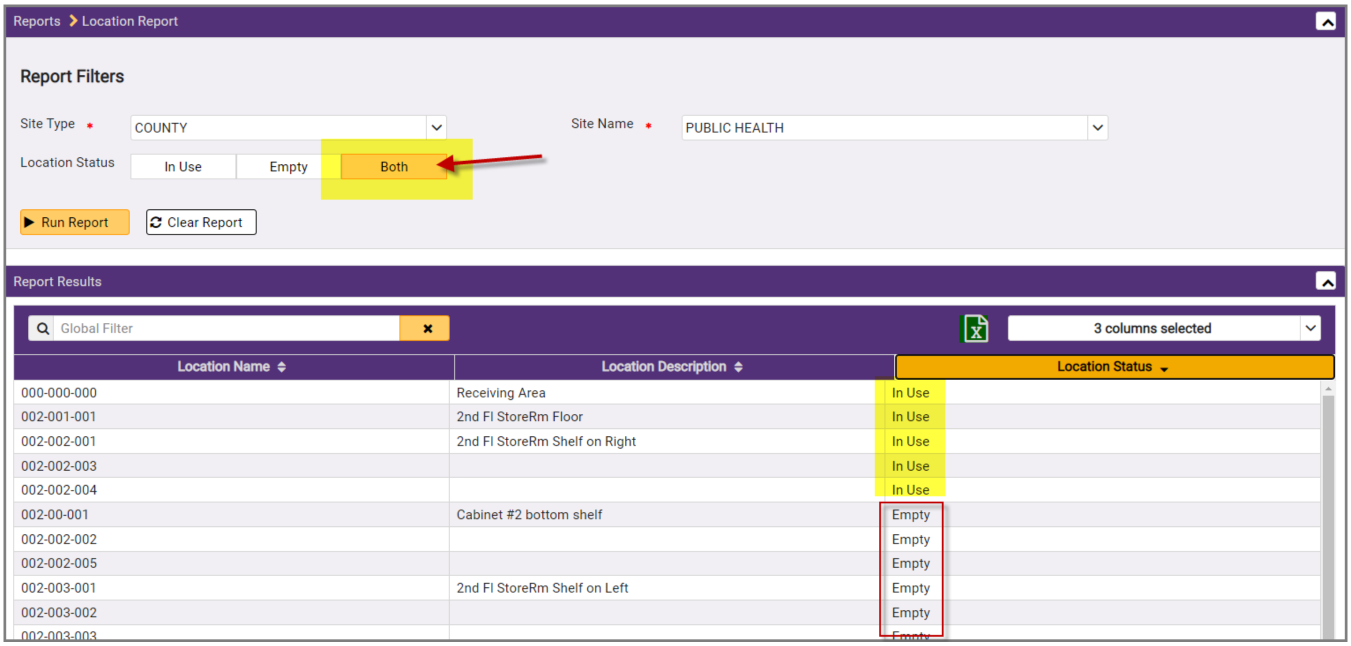
Notes:

Training Scenario 13: Generate MERITS Reports

All report results include a multiple-column selector and can be exported to Excel (.xlsx).

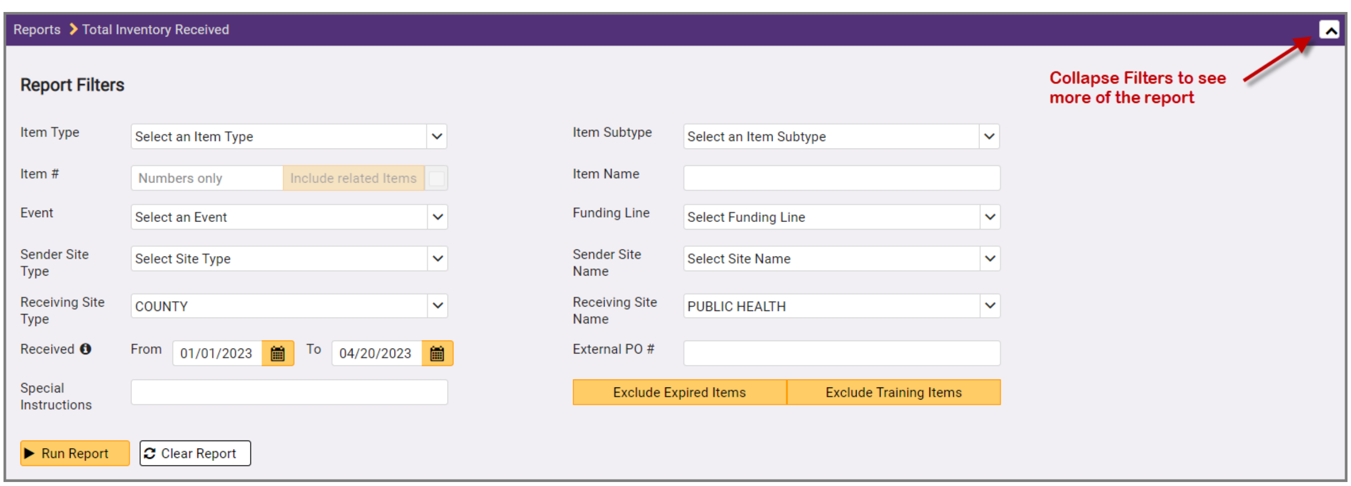
1. Select **Reports** to open the list of five available reports.
    - Item Management (for State-no demonstration/image)
    - Location Report - all locations for one Site Type and Name including Receiving Area (000-000-000)
    - Total Inventory Received
    - Total Inventory Issued
    - Item Transaction History

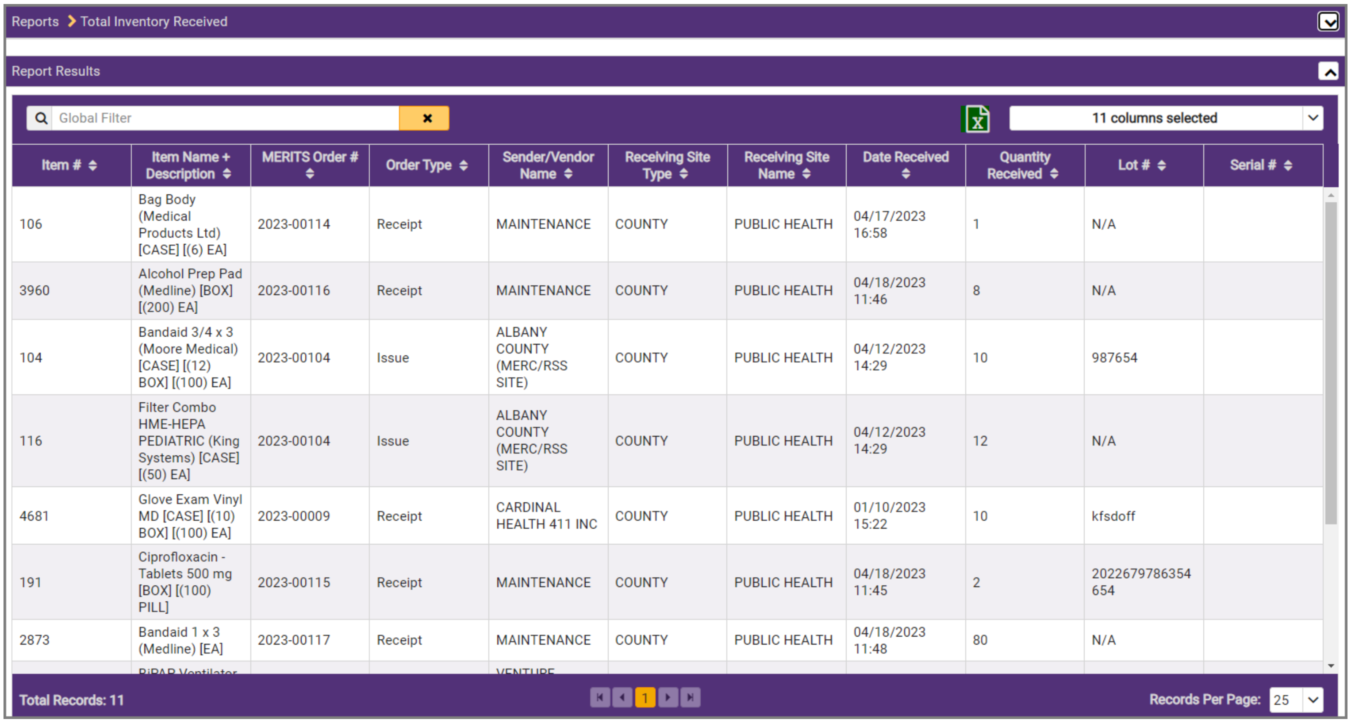
Location Report Example



Total Inventory Received Report Example

This report includes a date range filter which defaults to the current date in both **From** and **To**.





Item #	Item Name + Description	MERITS Order #	Order Type	Sender/Vendor Name	Receiving Site Type	Receiving Site Name	Date Received	Quantity Received	Lot #	Serial #
106	Bag Body (Medical Products Ltd) [CASE] [(6) EA]	2023-00114	Receipt	MAINTENANCE	COUNTY	PUBLIC HEALTH	04/17/2023 16:58	1	N/A	
3960	Alcohol Prep Pad (Medline) [BOX] [(200) EA]	2023-00116	Receipt	MAINTENANCE	COUNTY	PUBLIC HEALTH	04/18/2023 11:46	8	N/A	
104	Bandaid 3/4 x 3 (Moore Medical) [CASE] [(12) BOX] [(100) EA]	2023-00104	Issue	ALBANY COUNTY (MERC/RSS SITE)	COUNTY	PUBLIC HEALTH	04/12/2023 14:29	10	987654	
116	Filter Combo HME-HEPA PEDIATRIC (King Systems) [CASE] [(50) EA]	2023-00104	Issue	ALBANY COUNTY (MERC/RSS SITE)	COUNTY	PUBLIC HEALTH	04/12/2023 14:29	12	N/A	
4681	Glove Exam Vinyl MD [CASE] [(10) BOX] [(100) EA]	2023-00009	Receipt	CARDINAL HEALTH 411 INC	COUNTY	PUBLIC HEALTH	01/10/2023 15:22	10	kfsdoff	
191	Ciprofloxacin - Tablets 500 mg [BOX] [(100) PILL]	2023-00115	Receipt	MAINTENANCE	COUNTY	PUBLIC HEALTH	04/18/2023 11:45	2	2022679786354654	
2873	Bandaid 1 x 3 (Medline) [EA]	2023-00117	Receipt	MAINTENANCE	COUNTY	PUBLIC HEALTH	04/18/2023 11:48	80	N/A	

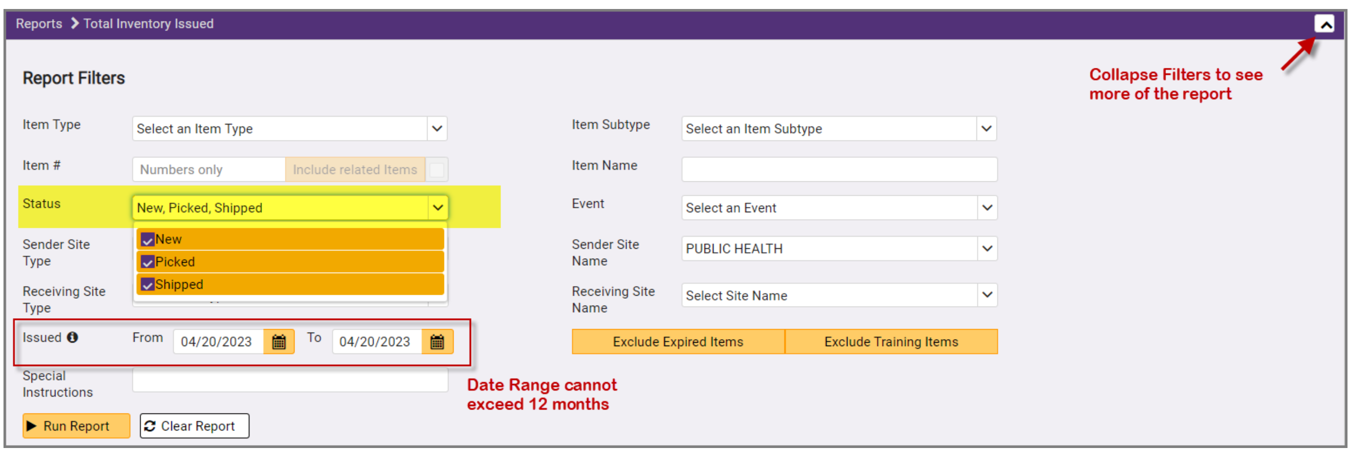
TIPS:

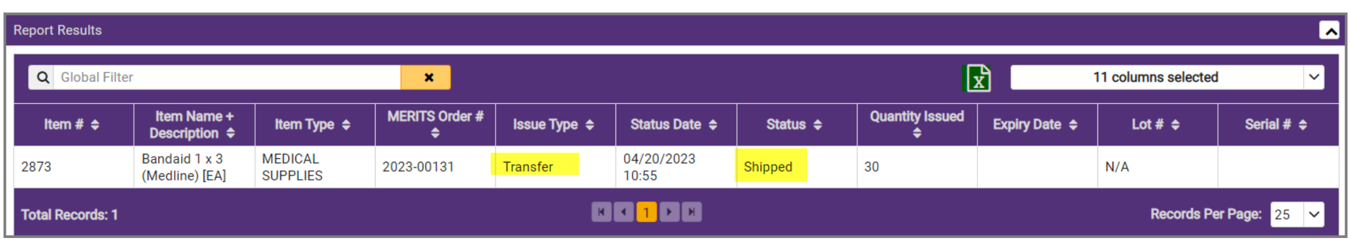
If items have not yet been received, then they will not appear in your **Inventory Received** report, because it only shows your current inventory.

Date Range for Received cannot exceed more than 12 months.

Total Inventory Issued Report Example

This report includes a date range filter that defaults to the current date in both **From** and **To**.





Item #	Item Name + Description	Item Type	MERITS Order #	Issue Type	Status Date	Status	Quantity Issued	Expiry Date	Lot #	Serial #
2873	Bandaid 1 x 3 (Medline) [EA]	MEDICAL SUPPLIES	2023-00131	Transfer	04/20/2023 10:55	Shipped	30		N/A	

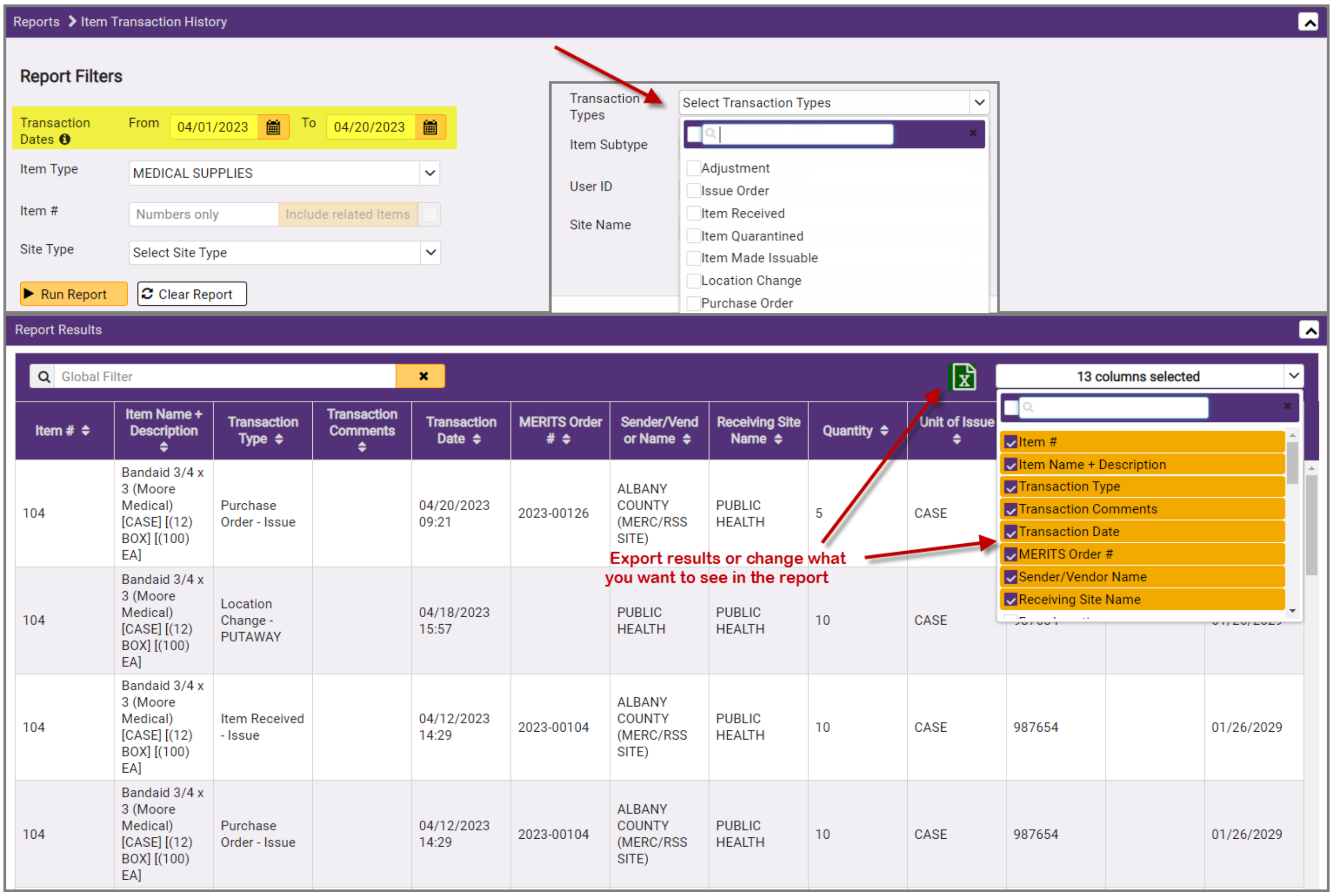
The default date for Issued it the current date, so if you don't see the results you expect, then check the date range.

If you want to include the **Expired Items Issued**, then click the Exclude Expired Items button before running report.

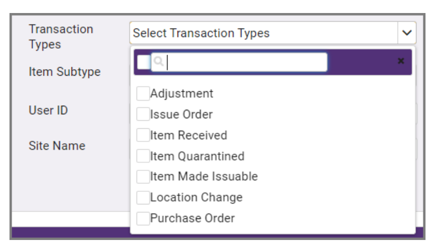
Item Transaction History Report Example

This report includes a date range filter that defaults to the current date in both **From** and **To.**

The **Transaction Types** filter looks for specific item transactions.



TIPS:



- Check Transaction Date Range and Transaction Types:
- The report filter Status (New, Picked, Shipped) determines what the report will show. An item can appear on the report if just added to the issue order (New Status), Picked or Shipped. If the item is an issue order, then it is considered "issued" even if it has not yet left the warehouse. This prevents the item from being added to another order.

Notes:

____

____