Inventory Management and Tracking System

Countermeasure Tracking Systems (CTS)

Inventory Management and Tracking System (IMATS)

User Guide

Version 1.8

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CDC Public Health Information

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1 INTRODUCTION

The Centers for Disease Control and Prevention (CDC) Countermeasure Tracking Systems (CTS) Inventory Management and Tracking System (IMATS) allows state and local public health to track medical and non-medical countermeasure inventory and supplies during daily operations or an event. The system includes functions such as receipts, put away, and shipping. These functions allow users to enter detailed information about assets, such as total number received, lot number, expiration date and storage location.

IMATS is deployed on the CDC network. CDC requires a level of security to ensure the protection of private and/or sensitive information from unauthorized disclosure, loss, or damage. The CDC Secure Access Management Services (SAMS) is an access management system that is designed to authenticate users and allow access to applications for which access rights have been granted. SAMS is the next generation replacement for CDC's legacy Secure Data Network (SDN) portal and does not require the use of digital certificates. SAMS will function as the access gateway to IMATS, as well as the other CTS programs.

This document is intended to help administrators configure IMATS for use in their planning jurisdictions. There are two standard roles in IMATS—the Public Health Administrator (PHA) and the Facility Administrator. The PHA role will be granted to users with high-level management or oversight responsibilities for a project area (one of CDC's 62 Public Health Emergency Preparedness Cooperative Agreement grantees, which include 50 states, four directly funded localities, three U.S. territories, and five freely associated states). The Facility Administrator is an individual who manages one or more facilities. This role is granted to administrators who do not fit in the PHA role and may be used for local or regional managers.

This document provides separate sections for the PHA role and the Facility Administrator role with the steps necessary to set up IMATS for use. Options for setting up IMATS are included in Appendix B. Additionally, Appendix C includes a series of tasks that can be provided to new users as a training tool.

Training material is available on the IMATS webpage at http://www.cdc.gov/cts/imats/supporting-info.html. Additional materials are currently being developed and will be added to the IMATS webpage as they become available. All IMATS questions should be submitted to CTSHelp@cdc.gov.

2 USEFUL TIPS

- For online help, select the "?" icon at the top right corner of each page to access documentation information.
- Use the application's **Back** button, when available, to return to the previous page.
- Use the application's **Next** button, when available, to continue to the next page.
- Use the **Add** button to save a new item.
- Use the **Done** button to exit the Add function.
- Information must be entered into those data fields marked with a red asterisk (*). Those fields cannot be left blank. You will not be able to proceed until these fields are populated.
- Based on information previously entered, you might be required to populate certain additional "conditional" data fields even though they are not marked with a red asterisk (*).
- IMATS contains two standard roles—PHA and Facility Administrator. Additional roles may be added using the Custom Roles process located under the **Setup** menu.
- The **Products** sub-menu found under **Setup** is used to configure product information, such as name, manufacturer, and National Drug Code (NDC)/stock number. Information regarding actual inventory is added using the **Inventory Management** menu.
- To view the current inventory in a facility, use the Inventory Management>Inventory>Search Inventory function. This is where a user will have the opportunity to make manual adjustments if permission has been granted. Steps for these processes can be found in the online help documentation.
- There may be minor differences between the version of IMATS you evaluate and the production version. These differences should not affect your evaluation.
- Appendix B: Setup Options provides several alternatives for configuring IMATS.
- If you need assistance or have any questions, please contact the IMATS support staff at CTSHelp@cdc.gov.

3 PUBLIC HEALTH ADMINISTRATOR (PHA)

Prior to using IMATS, a PHA may add facilities within the PHA's project area. Once this is complete, custom roles and users can be added at the project area level or the facility level. PHAs have access to all facilities and inventory data within their project area; however, it is unlikely that they will do any processing at the facility level. The PHA role is meant for a high-level state administrator who has management or oversight responsibilities.

3.1 MENU OPTIONS

Bold items are described in the following sections.

Inventory Management	Reports	Data Exchange	Setup
• Requests – Search, Add	• Count Inventory Report	• Search Requests	• **Facility** – Search Facilities, **Add Facility**, Search Storage Locations, Add Storage Location, Add Range of Locations
• Purchase Order – Search, Add	• Audit Trail Report	• Search Reports	• Import
• Receive – Search, Add		• View Logs	• Export
• Put Away			• Product – Search, Add, Assign Unit of Measure
• Pick – Search, Add, Search Requests (create pick list)			• Supplier – Search, Add
• Back Order – Search, Add			• Unit of Measure – Search, Add
• Shipment			• **Users** – Search, **Add**
• Push Package			• **Custom Roles** – Search, **Add**
• Inventory - Search Inventory, Add Inventory Item, Move Inventory, Transfer Inventory			• Funding Source – Search, Add

3.2 FACILITIES

A facility in IMATS is any place you store inventory (e.g., warehouse, store room).

3.2.1 Add Facilities

Create facilities in your project area.

To add a facility:

- On the **Setup** menu, click **Facility**, and then **Add Facility**.
- Under **New Facility**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area where the facility belongs
Region	No	Region within the project area where the facility is located
Facility Name	Yes	Name of the facility
Status	Yes	Status of the facility • **Active:** Supplies **can** be shipped to this facility • **Inactive:** Supplies **cannot** be shipped to this facility
Type of Distribution Site	Yes	Designates the type of distribution site.
RSS Site Priority	Conditional	Required only if Type of Distribution Site is State RSS.
Facility Type	Yes	Type of facility (for example, a hospital or local health department)
Facility Type, Other	Conditional	Required only if Facility Type is Other
POD, Closed Type	Conditional	Required only if Facility Type is POD, Closed
POD, Closed Type Other	Conditional	Required only if POD, Closed Type is Other.

Field	Required?	Description
Notes	No	Any text that you feel would be helpful to include

- Under **Ship to Address**, enter the following information:

Field	Required?	Description
Address Line 1	Conditional*	Facility's street address
Address Line 2	No	Continuation of the street address, if needed
Longitude	Conditional*	Facility's longitude
Latitude	Conditional*	Facility's latitude
City	Yes	City where the facility is located
State	Yes	State where the facility is located
Zip Code	Yes	Facility's zip code
County	No	County where the facility is located

*Either the street address **or** longitude/latitude must be entered.

- Under **Receiving Capabilities**, enter the following information:

Field	Required?	Description
Loading Dock(s) Available	No	Select if the facility has one or more loading docks
Number of Loading Docks	Yes: If you selected the **Loading Dock(s) Available** check box	Number of loading docks in the facility
Accommodate 53-foot Trailer	No	Select if the facility can accommodate a 53-foot trailer
Maximum Truck Size	No	Maximum truck size the facility can accommodate
Fork Lift Available	No	Select if the facility has a fork lift that can be used
Lift Gate Available	No	Select if the facility has a lift gate that can be used

- Under **Primary Contact**, enter the following information:

Field	Required?	Description
Primary Contact	Yes	Facility's primary point of contact
Telephone	Yes	Phone number of the primary contact
Ext	No	Extension of the primary contact's phone number
Cell Phone	No	Cell phone number of the primary contact
Fax	No	Fax number of the primary contact
Email Address	Yes	Email address of primary contact

- Under **Secondary Contact**, enter the following information:

Field	Required?	Description
Secondary Contact	No	Facility's secondary point of contact
Telephone	No	Phone number of the secondary contact
Ext	No	Extension of the secondary contact's phone number
Cell Phone	No	Cell phone number of the secondary contact
Fax	No	Fax number of the secondary contact
Email Address	No	Email address of secondary contact

- Click the **Add** button to add the facility.

3.3 CONFIGURE USERS FOR PHA ROLE

Prior to the use of IMATS for inventory management, system administrators must create the necessary roles and users for the system. There are two standard roles in IMATS—the PHA and the Facility Administrator. Roles needed within a project area or facility need to be created locally.

3.3.1 Custom Roles

Create necessary roles for your project area and/or facilities. For example, a custom role named "Pick Team" may be created with permissions to the Pick and Ship functions only.

To add a custom role:

- On the **Setup** menu, click **Custom Role**, and then **Add Custom Role**.
- Under **New Custom Role**, enter the following information:

Field	Required?	Description
Role Type	Yes	Designates the level the role is assigned to (facility level, for example)
Role Name	Yes	Name of the custom role

Field	Required?	Description
Description	No	Any text that you feel would be helpful in describing the role

- Click the **Next** button to add the permissions.

To assign permissions to the role:

- Under **New Custom Role Permissions**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area the role is assigned to
Facility	Yes	Facility or facilities within the project area the role is assigned to

- Under **Permissions**, select the check box next to each permission you want to assign. To select/deselect all permissions, select the **Select/Deselect all** check box.

  NOTE: You must select at least one permission.

- When you are done, click the **Add** button. The system saves the information you entered, displays the previous page, and displays the role on the right side of the page.

3.3.2 Add Users

Add users to your project area and/or facilities.

To enter the basic information:

- On the **Setup** menu, click **User**, and then **Add User**.
- Under **New User**, enter the following information:

Field	Required?	Description
Title	No	User's title (for example, Mr. ,Ms., Mrs., Dr.)
First Name	Yes	User's first name
Middle Name	No	User's middle name
Last Name	Yes	User's last name
Suffix	No	User's name suffix (for example, Jr., Sr., MD, RN)

- Under **User Role**, enter the following information:

Field	Required?	Description
Role	Yes	User's role when using IMATS
Project Area	Yes	Project area the user roles and the user are assigned to

- Under **Address**, enter the following information about the user's home or work location:

Field	Required?	Description
Address Line 1	No	Street address
Address Line 2	No	Continuation line for street address, if needed
City	No	City
State	No	State
County	No	County
Zip Code	No	Zip code

- Under **Contact**, enter the following information:

Field	Required?	Description
Telephone	Yes	User's phone number
Ext	No	Extension of the user's phone number
Secondary Telephone	No	User's second phone number, if available
Ext	No	Extension of the user's second phone number
Email Address	Yes	User's email address, used as Username
Password	Yes	User's password for IMATS

- Click the **Next** button.

To assign a facility to the user:

- In the **Facility** list, select the check box next to each facility you want to assign. To select/deselect all facilities, select the **Select/Deselect all** check box.
- Click the **Next** button.

To assign permissions to the user:

- In the **Available Permissions** list, all permissions are selected. Deselect the check box next to each permission you do not want to assign to the user. To select/deselect all permissions, select the **Select/Deselect all** check box.

  NOTE: You must select at least one permission.

- Click the **Done** button. The system saves the information you entered, displays the previous page, and displays the user on the right side of the page.

3.4 DATA EXCHANGE

IMATS includes the Data Exchange feature. This feature enables state level users to respond to an Inventory Data Exchange (IDE) request from the CDC. The CDC will send an IDE request only during a public health event.

The following steps illustrate how the Data Exchange feature collects inventory count information and then integrates it into IMATS. The Data Exchange feature is available only to those with the Public Health administrator role.

1. From the IDE application, CDC DSNS creates and sends a request for inventory count information to participating project area IMATS users.
2. IMATS automatically creates an IDE report using the current project area data found in IMATS.
3. For IMATS users that collect data from local-level health departments, a data exchange export function is available and provides the ability to convert the IDE request into either an Excel spreadsheet or an XML file. This file can then be sent to the local-level health departments via e-mail, fax or other mode of transmission.
4. The local-level health departments enter the necessary data into the file and return it to the sender via e-mail, fax or other mode of transmission.
5. IMATS Data Exchange provides an import function for the local data. This function imports data contained in the Excel spreadsheets and XML files received from the local-level health departments and adds it to the IDE Report.
6. The project area user reviews and approves the IDE report and then sends the report to CDC DSNS via IMATS Data Exchange.

To search inventory count requests:

- On the **Data Exchange** menu, click **Search Requests**.
- Enter search criteria, and then click the **Search** button.
- To view details of a request, click the link in the **Request Name** column to display the request.

Field	Description
Request #	ID assigned to the request
Request Name	Name assigned to the request
Request Status	Status of the request • **Active:** The current request in the system for which reports are created and sent • **Closed:** A request that is no longer current; it has been replaced by a more recent request

To search and/or send inventory count reports to CDC:

- On the **Data Exchange** menu, click **Search Reports**.
- Enter search criteria, and then click the **Search** button.
- To view details of a report, click the link in the **Report Name** column to display the report.
- To send the report to the CDC, click the **Send** button.

Field	Description
Project Area	ID assigned to the request
Report Status	Status of the report • **Pending:** IMATS has generated the report, but it has not yet been sent to the CDC • **Sent:** The report has been sent to the CDC

4 FACILITY ADMINISTRATOR

Prior to the use of IMATS for inventory management, facilities, custom roles and users must be added to the system. Once this is complete, local data can be imported for a facility.

4.1 MENU OPTIONS

Bold items are described in the following sections.

Inventory Management	Reports	Setup
• **Requests** – Search, **Add**	• Count Inventory Report	• **Facility** – Search Facilities, **Add Facility**, Search Storage Locations, Add Storage Location, Add Range of Locations
• Purchase Order – Search, Add	• Audit Trail Report	• **Import**
• Receive – Search, Add		• **Export**
• Put Away		• **Product** – Search, **Add**, Assign Unit of Measure
• **Pick** – Search, Add, **Search Requests (create pick list)**		• **Supplier** – Search, **Add**
• Back Order – Search, Add		• Unit of Measure – Search, Add
• Shipment		• **Users** – Search, **Add**
• Push Package		• **Custom Roles** – Search, **Add**
• **Inventory** - Search Inventory, **Add Inventory Item**, Move Inventory, Transfer Inventory		• Funding Source – Search, Add

4.2 CONFIGURE USERS FOR FACILITY ADMINISTRATOR ROLE

Prior to the use of IMATS for inventory management, system administrators must create the necessary roles and users for the system. There are two standard roles in IMATS—the PHA and the Facility Administrator. Roles needed within a project area or facility need to be created locally. If an administrator chooses not to use the Import function, local data may be added using the process described in Section 4.4.

4.2.1 Custom Roles

See Section 3.3.1 for details.

4.2.2 Add Users

See Section 3.3.2 for details.

4.3 IMPORT LOCAL DATA

The Import feature provided in IMATS allows users to upload data from their existing inventory management system(s). The local data will have to be translated into the proper format(s), as described below. Users may choose to use the Import feature or manually input their data as described in Section 4.4.

The Import function appends new records into the database and is not intended to be used to update current inventory data.

For a successful data import into IMATS, be sure to import in the following order:

1. Facilities
2. Storage Locations
3. Users
4. Suppliers
5. Products
6. Units of Measure
7. Inventory

NOTE: Import templates are provided on the IMATS webpage at http://www.cdc.gov/cts/imats/documents/imats_importtemplates_v1_8.zip.

- At the top of the page, click **Setup**, and then **Import**.
- Under **Import Data**, enter the following information:

Field	Required?	Description
File	Yes	Name of the file containing the data you want to import Do one of the following: • Enter a filename • Click the **Browse** button to select the file
Import Data File Type	Yes	File type you want to import File formats are listed in the following sections
Project Area	Conditional (Depends upon your user role)	Project area the users belong to
Facility	Conditional (Depends upon your user role)	Facility within the project area where material/user is located

- Click the **Preview** button. The file displays so that you can make sure it is the one you want to import.
    - The import files should not contain a column heading row. If using the import templates provided above, export the data to a tab-delimited text file, open the text file, delete the first row, and then save the file.
- Is the correct file displayed?
    - If **Yes**, continue to the next step.
        - To import users
            - Click the **Next** button, and continue to assign permissions.

        - In the **Available Permissions** list, all permissions are selected. De-select the check box next to each permission you do not want to assign to the users. To select/deselect all permissions, select the **Select/Deselect all** check box.

          NOTE: You must select at least one permission.
        - Click the **Import** button. A confirmation message displays stating that the file will be loaded into IMATS.
        - Click the **OK** button. The system imports the file from your computer and processes it so that the users can log in and use IMATS.
    - If **No**, click the **Back** button, and repeat the previous two steps.
- Click the **Import** button. A confirmation message will display stating that the file will be loaded into IMATS for the selected facility.
- Click the **OK** button. The system imports the file from your computer and processes it so that you can view the items.
    - If the file is not formatted properly, the issues will be flagged with the icon. Fix any data issues and import the file.

4.4 MANUALLY INPUT LOCAL DATA

4.4.1 Add Storage Locations

A storage location is a physical space within a facility (e.g. "Receiving Dock A")

To add one storage location at a time:

- On the **Setup** menu, click **Facility**, and then **Add Storage Location**.
- Under **New Storage Location**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area to which the storage location is assigned
Facility	Yes	Facility within the project area to which that storage location is assigned

- Under **Location**, enter the following information:

Field	Required?	Description
Name	Yes	Name of the storage location
Receiving Area Check box	No	Select this check box if the location is used only to receive items, not to store them on a more permanent basis
Type	Yes	Defines the type of items stored in the location
Type text box Enabled only if the **Type** field is **Other**	Yes: If it is enabled	Enter the type of items stored in the location
Status	Yes	Status of the storage location • **Available:** Inventory **can** be stored in the location • **Blocked:** Inventory **cannot** be assigned to the location by the system; it must be stored manually • **Inactive:** Inventory **cannot** be stored in the location, because it is not being used

Field	Required?	Description
		• **Full:** Inventory **cannot** be stored in the location, because it is full
Square Footage	No	Square footage of the storage location; numbers and decimal points are allowed
Notes	No	Any text you feel it would be helpful to include

- Click the **Add** button. The system saves the storage location and displays it on the right side of the page.

To add a range of storage locations:

- On the **Setup** menu, click **Facility**, and then **Add Range of Storage Locations**.
- Under **Add Range of Storage Locations**, enter the following information, if the fields display on your screen:

Field	Required?	Description
Project Area	Yes	Project area to which the storage location is assigned
Facility	Yes	Facility within the project area to which that storage location is assigned

- Under **Location**, enter the following information:

Field	Required?	Description
Name	Yes	Designates the main area where the range of storage locations is For example you might enter **Room 100** or **Receiving**
Receiving Area Check box	No	Select this check box if the location is used only to receive items, not to store them on a more permanent basis
Type	Yes	Defines the type of items stored in the location

Field	Required?	Description
Type text box Enabled only if the **Type** field is **Other**	Yes: If it is enabled	Enter the type of items stored in the location
Status	Yes	Status of the location • **Available:** Inventory **can** be stored in the location • **Blocked:** Inventory **cannot** be assigned to the location by the system; it must be stored manually • **Inactive:** Inventory **cannot** be stored in the location because it is not being used • **Full:** Inventory **cannot** be stored in the location because it is full
Square Footage	No	Square footage of the storage location; numbers and decimal points are allowed

- Under **Location Ranges**, enter the following information for **each** level you want to add:

Field	Required?	Description
Start Range	Yes	First number (or letter) in the level
End Range	Yes	Ending number (or letter) in the level you are adding

- If you would like to include a separator between the levels, select one in the **Range Separator** field.

  What is a separator?

  A separator (a space, dash, comma, etc.) is placed between the levels in a location. Using a separator can make reading the location a little easier.

  For example, if you have a location named **Floor 5Section 3Shelf 2**, you could add a comma between the levels so that the location would read **Floor 5, Section 3, Shelf 2**.

- If desired, do one of the following:
  - Click the **Preview Locations** link to view the storage locations you have created so far.

- Click the **Clear Location Ranges** link to delete the information you have entered.

- Click the **Add** button. The system saves the range of locations and displays it on the right side of the page.

4.4.2 Add Suppliers

To add a supplier:

- On the **Setup** menu, click **Supplier**, and then **Add Supplier**.
- Under **New Supplier**, enter the following information:

Field	Required?	Description
Project Area	No	Project area that is to receive supplies from the supplier If a project area is not selected, the supplier will be assigned to all project areas
Facility	No	Facility within the project area that is to receive supplies from the supplier If a facility is not selected, the supplier will be assigned to all facilities in the project area
Supplier Name	Yes	Name of the supplier
Status	Yes	Status of the supplier • **Active:** Supplier is a viable source of supplies • **Inactive:** Supplier is **not** a viable source of supplies ***NOTE:*** An inactive supplier is **not** deleted from the system, which means you can still search for it and view its information
Supplier Type	Yes	Type of supplier (manufacturer, retailer, distributor, etc.)
Notes	No	Any text that you feel would be helpful to include

- Under **Address**, enter the following information:

Field	Required?	Description
Address Line 1	No	Supplier's street address
Address Line 2	No	Continuation line for supplier's street address, if needed
City	No	City where the supplier is located
State	No	State where the supplier is located
Zip Code	No	Supplier's zip code
County	No	County where the supplier is located

- Under **Contact**, enter the following information:

Field	Required?	Description
Name	Yes	Name of the supplier contact
Title	No	Title of the supplier contact (Mr., Ms., etc.)
Telephone	Yes	Contact's phone number
Ext	No	Extension of the contact's phone number
Fax	No	Contact's fax number
Email	No	Contact's e-mail address

- Click the **Add** button. The system saves the supplier and displays it as a hyperlink on the right side of the page.

4.4.3 Add Product Information

To add a product:

- On the **Setup** menu, click **Product**, and then **Add Product**.
- Under **New Product**, enter the following information:

Field	Required?	Description
Project Area	Conditional (Depends upon your user role)	Project area to which the product is assigned If a project area is not selected, the product will be assigned to all project areas
Facility	Conditional (Depends upon your user role)	Facility or facilities within the project area to which that product is assigned If a facility is not selected, the product will be assigned to all facilities in the project area
Product Item Number	Yes	Product identifier Enter the number, and then select either **National Drug Code (NDC)** or **Stock Number or Model Number**
Product Name	Yes	Name of the product
Package Description	Yes	The lowest unit that represents how the product is packaged If an antibiotic is packaged as capsules in a bottle, the package description could be listed as **Bottle of 25**
Strength	No	Strength of the product when administered or dispensed (75 mg, for example)
Size Enabled only if **Product Item Number** field is **Stock Number or Model Number**	No	Size of the product (medium or large, for example)
Product Description	No	Any text helpful in describing the product

Field	Required?	Description
Manufacturer	No	Company that manufactured the product A manufacturer is a type of supplier If you don't see the manufacturer you are interested in, see Add Suppliers for instructions on adding it to the system
Notes	No	Any helpful text to include

- Click the **Add** button. The system saves the product and displays it on the right side of the page.

4.4.4 Add Inventory

To add an inventory item:

- On the **Inventory Management** menu, click **Inventory**, and then **Add Inventory Item**.
- Under **Add Inventory Item**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area where the item is located
Facility	Yes	Facility within the project area where the item is located
Product Name	Yes	Name of the item you want to add Begin typing the name. After the first three characters, the system will list all products that match your entry
Storage Location Type	Yes	Allows user to filter the list of storage locations displayed in the Storage Location drop down list
Storage Location	Yes	Storage location where the item is stored
Serial Number	No	Item's serial number
Lot Number	Conditional (required for products with NDC)	Item's lot number
Product Expiration Date	Conditional (required for products with NDC)	Date the item expires Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date
Funding Source Type	Yes	Type of funding source (state or local, for example)
Funding Source	No	Name of the funding source
Quantity	Yes	Total number of units located in inventory

Field	Required?	Description
		If the **Quantity** field is set to **10** and the **Unit of Measure** field is **Box**, this means 10 boxes are located in inventory
Unit of Measure	Yes	How the item is packaged (for example, bottle, box, etc.)
Units per UOM	Yes	Number of items contained in the unit of measure you entered in the **Unit of Measure** field If the **Unit of Measure** field is set to **Box** and the **Units per UOM** field is **20**, this means each box contains 20 units

- Click the **Add** button. The system saves the item and displays it on the right side of the page.

4.5 ADD REQUEST

The following instructions explain how to add a request to the system. A request is used to order items from another IMATS facility. A similar process, Add Purchase Order, is used when ordering items from a supplier outside of the IMATS system.

To add a request:

- On the Inventory Management menu, click **Requests**, and then **Add Request**.
- Under **New Request**, enter the following information:

Field	Required?	Description
Request Number	---	The system populates this field with a number that identifies the purchase order
Project Area	Yes	Project area that is requesting products
Facility	Yes	Facility within the project area that is requesting products
Funding Source Type	Yes	Type of funding source for the requested items (state or local, for example)
Funding Source	No	Source of funding for the requested items; the funding sources can be configured by an administrator using the setup menu

Field	Required?	Description
Requested From	Yes	Facility you are requesting the items from
Status	N/A	The system populates this field with the status of the request
Date Requested	Yes	Date the items were requested The system populates this field with the current date To change the date, enter it in mm/dd/yyyy format, or click the **Calendar** button to select a date
Notes	No	Any text that you feel would be helpful to include

- Under **Shipment Information**, enter the following information:

Field	Required?	Description
Request From POC	No	Point of contact at the facility you are requesting the products from The system populates this field with the name that was entered when the facility was added to IMATS If desired, you can change the point of contact; note that doing so will change the point of contact only for this request, not for the entire system
Request From Phone Number	No	Phone number for the point of contact at the facility you are requesting products from The system populates this field with the number that was entered when the facility was added to IMATS If desired, you can change the phone number; note that doing so will change the phone number only for this request, not for the entire system
Shipment Date	No	Date the items were shipped Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date

Field	Required?	Description
Estimated Arrival Date	No	Date the items are estimated to arrive in your facility Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date
Shipped Via	No	Transportation company used for shipping
Shipped From	No	Location of the facility that shipped the items
Tracking Number	No	Shipment tracking number provided by the transportation company

- Click the **Next** button to add items to the request.

To add items to request:

- Under **Add Item**, enter the following information:

Field	Required?	Description
Product Name	Yes	Name of the product (item) to be added to the request Begin typing the name After the first three characters, the system will list all products found in the facility you are requesting items from
Product Item Number	N/A	The system populates this field with the item's NDC or stock #/model # that was entered when the item was created
Quantity	Yes	Total number of UOMs being requested If the **Quantity** field is set to **10** and the **Unit of Measure** field is **Box**, this means you want to order 10 boxes
Unit of Measure	Yes	UOM of the item being ordered (box, case, etc.)
Notes	No	Any text that would be helpful to include

- Click the **Add** button. The system adds the item to the request and lists it on the right side of the page.

- Continue adding items, or click the **Done** button. The system saves the request and displays the previous page, where you can enter a new request, if desired.

4.6 CREATE A PICK LIST FOR PRODUCT REQUESTS

The following instructions explain how to create a pick list for items requested from another IMATS facility. For items to be sent to an outside entity, use the Add Pick List process.

To create a pick list:

1. On the **Inventory Management** menu, click **Pick**, and then **Search Requests**.
2. To display all product requests click the **Search** button.
3. To filter the requests, under **Search Requests**, enter information in one or more of the following fields:

Field	Description
Project Area	Project area where the items will be picked
Facility	Facility within the project area where the items will be picked
Requested By	Facility that is requesting the products
Request Number	Product request number Enter a partial or complete number
Request Date Range From/To	Date the items were requested Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date

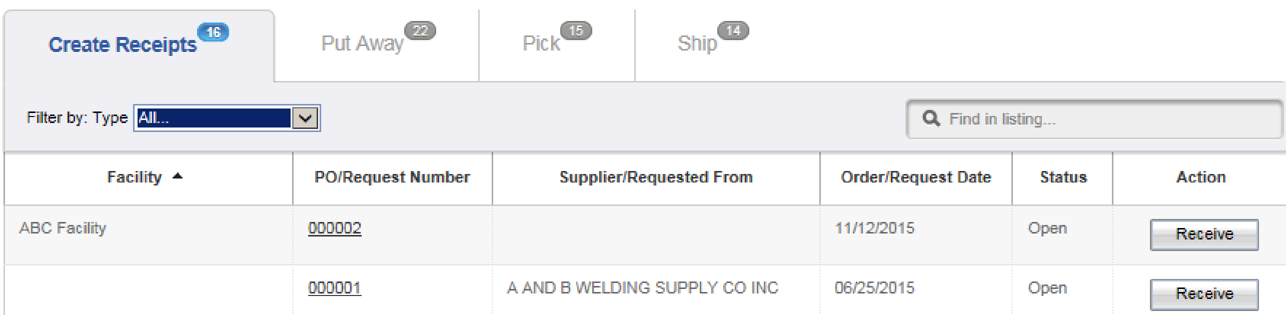
4. Click the **Search** button. The results display in the lower portion of the page.
5. Click the link in the **Request Number** column to display the request.
6. Review the list of requested items and select the check box next to each item you want to include on the pick list.
7. Click the **Create Pick List** button to generate a pick list. The pick list number will be displayed at the top of the page.

5 DASHBOARD

Users have a dashboard showing all items in Open status for their facility or facilities. The dashboard contains the following four tabs:

- Create Receipts
- Put Away
- Pick
- Ship

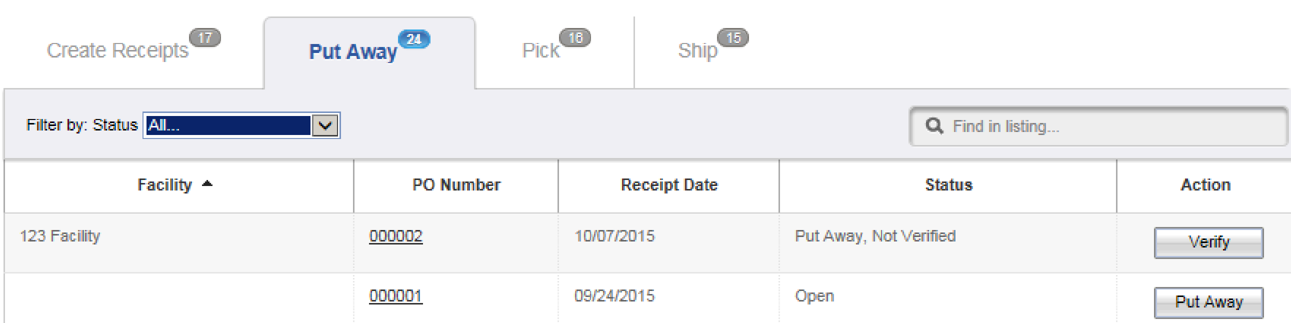
5.1 CREATE RECEIPTS



Facility ▲	PO/Request Number	Supplier/Requested From	Order/Request Date	Status	Action
ABC Facility	000002		11/12/2015	Open	Receive
	000001	A AND B WELDING SUPPLY CO INC	06/25/2015	Open	Receive

- This tab lists purchase orders (POs) in the Open status and requests in the Open or Pending status
- The PO/Request Number is a hyperlink to the **Edit Purchase Order** or **Edit Request** page
- The Action column contains a button labeled **Receive**. When clicked, the user will navigate to the **Add Receipt (PO)** or **Add Receipt (Request)** page.

5.2 PUT AWAY

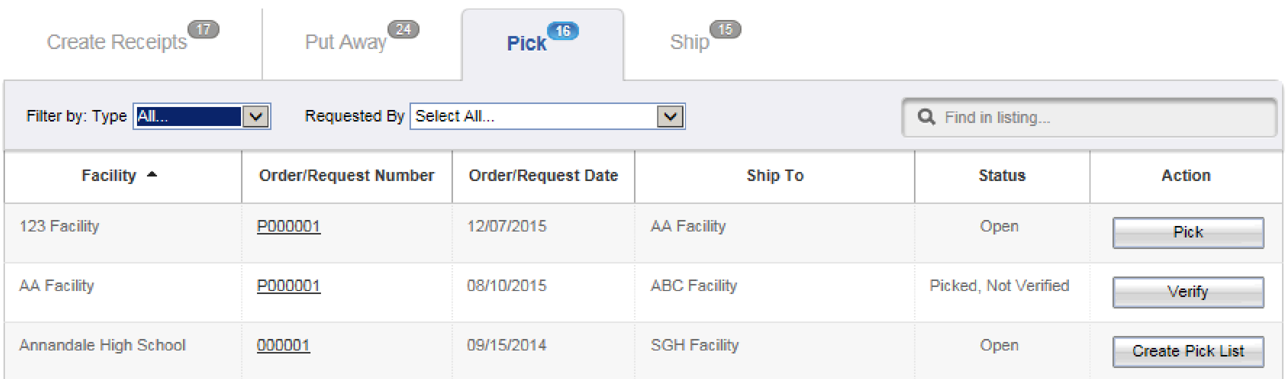


Facility ▲	PO Number	Receipt Date	Status	Action
123 Facility	000002	10/07/2015	Put Away, Not Verified	Verify
	000001	09/24/2015	Open	Put Away

- This tab lists all put away lists in the Open or Put Away, Not Verified status
- The PO Number includes a hyperlink to the **Edit Put Away** page

- The Action column contains the following:
  - Button labeled **Verify** for lists in the Put Away, Not Verified status. When clicked, an overlay displays items that have been put away. The user has two options: Verified (to verify and close the put away) and Cancel.
  - Button labeled **Put Away** for lists in the Open status. When clicked, the user navigates to the **Edit Put Away List** page

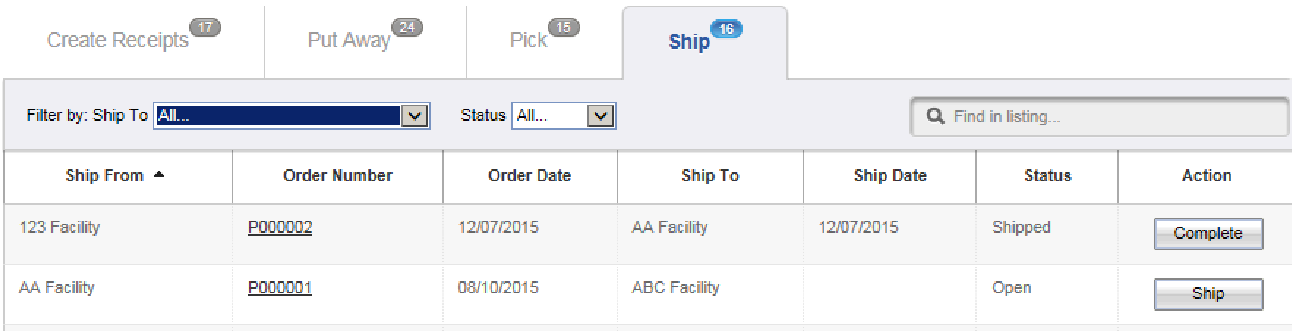
5.3 PICK



Facility	Order/Request Number	Order/Request Date	Ship To	Status	Action
123 Facility	P000001	12/07/2015	AA Facility	Open	Pick
AA Facility	P000001	08/10/2015	ABC Facility	Picked, Not Verified	Verify
Annandale High School	000001	09/15/2014	SGH Facility	Open	Create Pick List

- This tab displays pick lists in the Open or Picked, Not Verified status and requests (pick requests) in the Open status
- The Order/Request Number includes a hyperlink to the **Edit Pick List** page for orders only. For requests, the hyperlink navigates to the **Request Detail** page
- The Action column contains the following:
  - Requests: Button labeled **Create Pick List** that navigates to the **Request Detail** page
  - Pick lists in Open status: Button labeled **Pick** that navigates to the **Edit Pick List** page
  - Pick lists in the Picked, Not Verified status: Button labeled **Verify** that displays the verify overlay

5.4 SHIP



- This tab lists shipments in all statuses except Complete
- The Order Number includes a hyperlink to the **Edit Shipment** page
- The Action column contains the following:
  - Button labeled **Complete** for shipments in the Shipped or In Transit statuses. This will close the shipment.
  - Button labeled **Ship** for shipments in the Open, Pending or Hold status. The **Ship** button navigates to the **Edit Shipment** page like the hyperlink

6 APPENDIX A: SAMS ACCESS

All IMATS users must go through the CDC Secure Access Management Services (SAMS) proofing process prior to accessing the system. Please follow the steps below.

1. Send an email to ctshelp@cdc.gov stating that you would like to implement IMATS.
2. Provide the first name, last name, email address, phone number, role, and facility (if applicable) of individuals in your organization who will need access to the system. There are two main roles available in IMATS as well as custom roles, so please choose from the following:
    a. Public Health Administrator (PHA) – User with high-level management or oversight responsibilities for a project area*. The PHA role should only be given to individuals at the project-area level who require access to ALL facilities in the project area. By default, a PHA in a project area can view and edit ALL items associated with ALL facilities in the project area.

       **Project areas: CDC's 62 Public Health Emergency Preparedness grantees, which include 50 states, District of Columbia, three major metropolitan cities, three U.S. territories, and five freely associated states.*

    b. Facility Administrator – User who manages one or more facilities. The facility administrator role should be used for administrators that do not fit in the PHA role. This role may be used for local or regional managers. Facility administrators are able to access and edit ALL items in each facility to which they have access and can create new facility administrator accounts with the same or fewer permissions. Each facility administrator can have multiple facilities assigned to him.
    c. Custom Role – User assigned to a single facility that will be given a custom role. The Countermeasure Tracking Systems (CTS) team will create user accounts for all PHAs and Facility Administrators. The PHA or Facility Administrator will be responsible for creating custom roles for specific users.
3. Complete the SAMS identity proofing process. Each individual will receive an email from sams-no-reply@cdc.gov once he or she has been added to SAMS with instructions on how to complete the process (click SAMS training presentation for a presentation that details this process).

7 APPENDIX B: SETUP OPTIONS

A PHA in a project area who has chosen to use IMATS as the sole inventory management system has many options when setting up IMATS. The three approaches below provide an idea of what is possible; however, PHAs may choose to implement the system in their own ways.

7.1 CONFIGURE ALL

In this approach, the PHA would configure *ALL* facilities and users in the project area. The PHA may also set up all of the custom roles to be used by each facility.

This approach would have the PHA set up the top-level storage facilities in the project area and the administrator for each facility. For example, if Project Area A had two state facilities (RSS 1 and RSS 2), the PHA would configure a facility for each of these sites and would add a Facility Administrator for each. It would then be the responsibility of the two RSS Administrators to configure IMATS for their facility, as well as to add the facilities at the next level down, as shown in Figure 1.

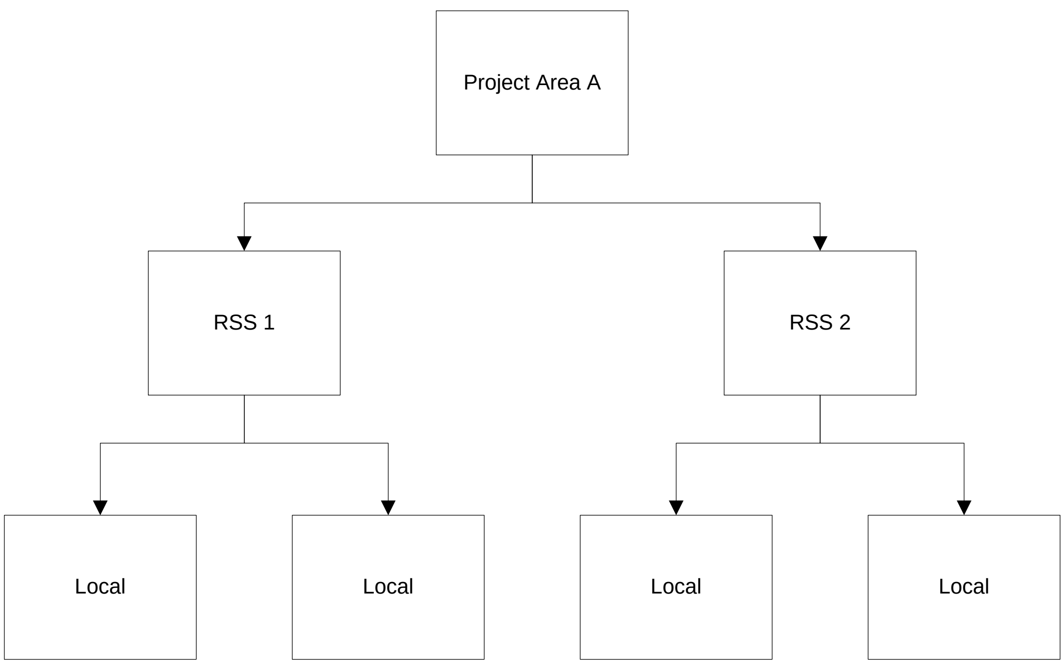


Figure 1 – Project Area Facilities

7.2 AS NEEDED

In this approach, each administrator is responsible for his or her facility or facilities. The administrator would only configure the suppliers, custom roles, users, etc. needed by the subject facility.

8 APPENDIX C: TASKS

The following tasks provide users with general steps to perform to become familiar with IMATS functionality. These tasks should be performed in the IMATS Training environment. A scenario is provided to give context to the tasks.

Scenario

A public health event has occurred in your project area and local areas need supplies to dispense to affected citizens. The Division of Strategic National Stockpile has notified you that 700 cases of doxycycline are being sent to one of your receipt, stage, and store (RSS) sites.

8.1 TASK 1: SEARCH FOR A FACILITY

- Timber Ridge Elementary School has been selected to act as a new point of dispensing (POD) for the current health event. You will begin distributing supplies to Timber Ridge.

  Search to see if the school exists in your system as a facility.

1. Use the system to attempt to locate Timber Ridge Elementary School.

- Proceed to next task.

8.2 TASK 2: ADD A FACILITY

Currently, new facilities have no users assigned by default.

- Add Timber Ridge Elementary School to your system. They have one loading dock and fork lift. Assign Timber Ridge Elementary School to your task lead.

1. Add a new facility using the following information:
   - Facility: Timber Ridge Elementary School
   - Phone: 404-555-1212
   - Contact: John Smith
   - Email: jsmith@cobb.edu
2. Create a secondary contact.
3. Complete adding a facility.

- Proceed to next task.

8.3 TASK 3: CREATE A CUSTOM ROLE

- Create a custom role in your warehouse using the following information:

1. Create your new custom role and enter the required information.
2. The screen defaults to your project area and facility (if only one available).
3. Role: Name your role (for example, “Pick Team”).
    - Custom Role Name:______________________________
4. Review the results by searching the custom roles.

- Proceed to next task.

8.4 TASK 4: ADD A NEW USER

- So that another person in your staff may manage the receipt of the items, create a user, and assign that user a role.

1. Create your new user and enter their required information.
2. Assign your new user the role you created in the last task.
3. Assign that user to the facility you created.
4. Grant your new user all permissions.
5. Complete adding a new user.
6. Note the new user to use in further tasks.
   - First Name:____
   - Last Name:____________________________________
7. Review the results by searching the user.

- Proceed to next task.

8.5 TASK 5: ASSIGN THE FACILITY TO NEW USER

This task cannot be performed until Timber Ridge Elementary School is assigned to the user performing the steps.

- Assign Timber Ridge Elementary School to your new user.

1. Select **User** from the **Setup** menu.
2. Assign Timber Ridge Elementary School to your new user.

- Proceed to next task.

8.6 TASK 6: ADD A NEW SUPPLIER

- A local retailer has donated medical supplies to your warehouse. This retailer does not currently exist in your system.

1. Locate the **Supplier** screen.
2. The screen defaults to your project area and facility.
3. Define the vendor’s name and abbreviation (for example, “local vendor” or “LV”).
4. Define status and type.
5. Enter in placeholder data for their phone number and email.

- Proceed to next task.

8.7 TASK 7: SET UP YOUR WAREHOUSE

- Create a location in your warehouse using the following information:

1. The screen defaults to your project area and facility (if only one available).
2. Location: Name your location (for example, “REC-1A”).
   - Location:______________________________
3. Location status: available.
4. Review the results by searching the locations.
5. Repeat the step above to add a receiving area location.

- Proceed to next task.

8.8 TASK 8: SET UP YOUR WAREHOUSE – ADD RANGE

- Create a range of locations in your warehouse using the following information:

1. The screen defaults to your project area and facility.
    - Location: 1st floor
    - Storage level: Start range (a to z)
    - Storage level: End range (1 to 10)

- Proceed to next task.

8.9 TASK 9: ASSIGN A UNIT OF MEASURE TO A PRODUCT

1. Assign a unit of measure (cases with 50 units per case) to a product.

   Doxycycline 100mg oral tablet, #20 tab unit of use

   NDC – 24658-220-20

   NOTE: This unit of measure is just for testing and may not be a true unit of measure for this product. This NDC pertains to a bottle containing 20 tablets. The unit of measure reflects how many units (in this case bottle) are in a case or pallet.

- Proceed to next task.

8.10 TASK 10: ADD A PURCHASE ORDER

- The truck carrying the 700 cases of doxycycline from DSNS is expected to arrive at RSS site in six hours. Place your expected material into IMATS by creating an order to DSNS.

1. Create a new purchase order. The screen defaults to your project area and facility.
2. Add the item (begin typing to populate the items available).

   Doxycycline 100mg oral tablet, #20 tab unit of use, NDC – 24658-220-20
3. Add 700 cases with 50 units per case. This is the unit of measure you added in task 10.
4. Complete adding the order (which will generate purchase order [PO] #).
5. Write down the PO # for later use.
   - PO #:____
6. Review the results by searching order.

- Proceed to next task.

8.11 TASK 11: RECEIVE YOUR PURCHASE ORDER

- The truck carrying the supplies has arrived at your RSS site. The supplies have been unloaded and stored in a temporary holding area. Add these additional items into your inventory using IMATS.

1. Select **Receipt** from the menu.
2. Locate the purchase order.
3. Select the purchase order and follow the link to receive against each item in that purchase order.
4. Enter date received, receipt location, quantity, and other required information.
5. Select a receiving location:
   - Location:________________________________
6. Complete adding the receipt.
7. Note the temporary holding location.
8. Verify inventory levels in the location.

   Hint: There are two ways to find this information: navigate to the **Storage Location** screen or search the inventory.

- Proceed to next task.

8.12 TASK 12: PUT AWAY THE ITEMS

- You have requested that your floor staff move the doxycycline shipment to a different holding area. They have done this.

1. Select **Put Away** from the menu.
2. Locate the purchase order.
3. Select the purchase order and follow the link to assign put away location.
4. Select a put-away location.
    - Location: ___________________.

    Hint: Select **Load All Locations** to show all available locations from the drop-down.

5. Select and put away the item.
6. Print the put-away list by selecting **Print List**.

- Proceed to next task.

8.13 TASK 13: CONFIRM THAT YOUR ITEMS HAVE BEEN PUT AWAY

- Due to the presence of untrained volunteers assisting in the movement of your doxycycline shipment, you ask your regular staff to confirm that all 700 cases of doxycycline were put away together.

1. Locate the purchase order.
2. Confirm the put away by verifying the item.
3. Verify inventory levels in the location.

   Hint: There are two ways to find this information: navigate to the **Storage Location** screen or search the inventory.

- Proceed to next task.

8.14 TASK 14: CREATE A PICK LIST

- You have received an order from Timber Ridge Elementary School. Create a pick list of the items that your warehouse staff will take off your shelves.

1. Create a new pick list.
2. Enter in PO # **12345**.
3. Select **Project Area** and **Facility**.
4. Select **Timber Ridge Elementary School** as the ship-to facility to receive the items.
5. Add 400 cases of **Doxycycline 100mg oral tablet, #20 tab unit of use, 20 bot** to your pick list.
6. To select the product, begin typing the item's name in the product name.
7. Fulfill the pick from the locations provided.
8. After entering the item, save the pick list.
9. Note the order number to use in further steps.
   - Order Number: ____

- Proceed to next task.

8.15 TASK 15: PICK AND VERIFY THE PICK LIST

- You and several volunteers have picked the items off the shelves and stored them at the loading dock. Mark your pick list as Picked.

1. Locate the pick list created in the previous task.
2. Print the pick list by selecting **Print List**.
3. Select and pick the items.
4. Select and verify the items.
5. Verify remaining inventory levels in the location.

   Hint: There are two ways to find this information: navigate to the **Storage Location** screen or search the inventory.

- Proceed to next task.

8.16 TASK 16: FIND YOUR SHIPMENT AND EDIT DETAILS

- Locate your shipment and enter shipment details. Timber Ridge Elementary School is stocked to capacity and would like you to move your shipping date one week. Edit your shipment details by setting its status to Hold. The shipment will be sent by truck. Print your invoice.

1. Locate your shipment.
2. Edit your shipment details and enter shipment information.
3. Print pallet labels and shipping document.

- Proceed to next task.

8.17 TASK 17: RECEIVE ITEMS WITHOUT PURCHASE ORDER

- A local supplier has donated 100 bottles of 45 mg strength Tamiflu to your warehouse. Each bottle contains 40 tablets. In addition, the supplier has promised to provide regular shipments of Tamiflu for as long as the health event continues. The items that were donated have reached your warehouse.

1. Select **Receive** from the menu.
2. Add a new receipt.
3. The screen defaults to your project area and facility.
4. Enter supplier, funding source, product, location, quantity, and other required information.
5. Select a receipt location. Location: ___________________________________
6. Verify updated inventory levels in the location.

   Hint: There are two ways to find this information: navigate to the **Storage Location** screen or search the inventory.

7. Do "put away" as explained in previous tasks.

9 APPENDIX D: GLOSSARY

The following table lists common terms used throughout IMATS.

Term	Definition
Back Order	A process for handling requested items that are not available in inventory.
Custom Role	A role assigned to a user that has been customized with specific permissions required for the user to perform his/her job tasks.
Data Exchange	The process used for exchanging requests for inventory counts from CDC to project areas and reports of inventory counts from project areas to CDC.
Data Exchange Report	A collection of inventory counts for a specific project area and reporting date usually generated by the project area and transmitted to CDC.
Data Exchange Request	A request made by CDC to the project areas for a report of inventory counts of specific products.
Facility	Any place where inventory is stored. This could be a distribution center, warehouse or a store room within a hospital.
Funding Source	The entity that supplies monies for products.
Inventory Management and Tracking System (IMATS)	The IMATS solution provides state and local public health providers with a tool to track medical and non-medical countermeasure inventory and supplies during daily operations or an event. The solution tracks quantity of inventory and facilitates warehouse operations, including receiving, staging, and storing inventory.
Item Number	The National Drug Code (NDC) or stock number for a product.
Jurisdiction	Locality, as defined by the project area not the CDC, within the project area where a facility is located.
Move Inventory	Process used to move items from one storage location to another within a facility.
National Drug Code (NDC)	The unique numeric identifier for a packaged pharmaceutical as recognized by the Food and Drug Administration (FDA).
Non-pharmaceutical	A product that is not a prescription drug. Examples include personal protective equipment and medical/surgical supplies or equipment.

Term	Definition
Package Size	For pharmaceuticals, this is the amount of product in a package. For example, 50 tablets in a bottle. For non-pharmaceuticals, an example would be “1” when “Each” is selected for the package type.
Package Type	For pharmaceuticals, this is the packaging noted in the third segment of the NDC. Possible types include vial, bottle, box, and blister pack. For non-pharmaceuticals, the package type chosen should properly identify the smallest unit used for the product. For example, “Box”, “Carton” or “Each”. See Appendix D for valid values
Pharmaceutical	A drug or medicine used in medical treatment.
Pick	The process of selecting or pulling items from storage in order to fill a request for products.
Product	A pharmaceutical or non-pharmaceutical inventory item.
Project Area	A recipient of funds from CDC’s Public Health Emergency Preparedness (PHEP) cooperative agreement. The 62 recipients include 50 states, Washington, D. C., Chicago, Los Angeles, New York City, and eight territories and freely associated states.
Purchase Order	A list of products that a facility requests from a supplier.
Push Package File	A push package file contains information about containers (and their contents) received from the Division of Strategic National Stockpile (DSNS) during a national event.
Put Away	The process used to move items from a receiving area to storage location.
Receipt	Process used to identify incoming items. There are three processes: Receipt (PO) for receiving goods order with a purchase order, Receipt (Request) for receiving items ordered using the request process and Receipt (without PO) for receiving items that were not ordered.
Region	Locality, as defined by the project area not the CDC, within the project area where a facility is located.
Request	A list of products that a facility requests from another IMATS facility.
Ship From	The facility that is shipping items.
Ship To	The facility that is receiving items.

Term	Definition
Standard Unit of Measure	A unit of measure that has a constant number of units. For example "Dozen" will always have twelve units.
Storage Location	A physical location within a facility. For example, "Receiving Dock 1A" or "Shelf 1A3C".
Strength	The amount of active ingredient present in each dosage (for example, 500 mg).
Supplier	Any entity that provides products. This could be a vendor, manufacturer (maker of the product), or a facility.
Transfer Inventory	Process used to transfer items from one facility to another facility.
Type of Distribution Site	Designates the type of distribution site a facility is. For example, treatment center, point of dispensing, etc.
Unit of Measure (UOM)	The unit used for counting items, such as case, box, pallet or each.

10 APPENDIX E: RSS SITE PRIORITY VALID VALUES

The following table lists the valid values for RSS site priority. Use the abbreviation for import files.

RSS Site Priority	Abbreviation
Primary	P
Secondary	S
Tertiary	T

11 APPENDIX F: FACILITY TYPE VALID VALUES

The following table lists the valid values for Facility Type. Use the abbreviation for import files.

Facility Type	Abbreviation
Alt. Care Facility	ALTCARE
Commercial Pharm	COMMPHARM
Community Clinic, Othr	COMMCLNC
Correctional Facilities	CORRECTIONS
Fed Facilities	FEDFAC
Fed Qualified Comm Hlth Clinic	FEDHLTHCLNC
Hospital	HOSP
Indian Health Svc	HIS
Local Health Dept	LHD
Nursing Home/Assisted Living	NURSHOME
Other	OTHR
POD, Closed	POD-C
POD, Open	POD-O
Private Physician	PRIVPHYS
Storage Facility	STRGFAC
Tribal Govt	TRIBAL
Visiting Nurse/Home Hlth	VISITNURS