

McKesson SupplyManager Quick Reference Guide Trunk Replenishment

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Trunk Replenishment Orders require a Clinician and a Patient (if supply is Patient Billable).

- **Ensure the Clinician exists in Supply Manager and the Patient exists in Supply Manager.**
- **If not found; Add the Clinician into Supply Manager and the Patient into Supply Manager.**
- Click on “Tools” tab of blue toolbar, click on “Clinician Maintenance” or “Patient Maintenance” hyperlink

- Enter a Clinician Name (or a portion of the name) or a Clinician ID and click on **FIND**
- To add the Clinician, click on **ADD NEW CLINICIAN**
- Asterisk fields are required – Clinician ID, First Name, and Last Name. Other fields are optional.
- Click on **SAVE NEW CLINICIAN**
- Clinician Address is required to ship Trunk Replenishment Order to his/her home.
- Enter a Patient Name (or a portion of the name) or a Patient ID and click on **FIND**
- To add the Clinician, click on **ADD NEW PATIENT**
- Asterisk fields are required – Patient ID, First Name, and Last Name. Other fields are optional.
- Click on **SAVE NEW PATIENT**
- Click on **ADD NEW ADDRESS**
- Asterisk fields are required – Address, City, State, and Zip. Check mark “Set as Default Address” if this is Patient’s only personal address.
- Click on **SAVE & CONTINUE**

To create a Trunk Replenishment Order – Click the **Trunk Replenishment** link from the “Essential Tasks” box

Choosing the Correct Clinician

- Enter a Clinician Name (or a portion of the name) or a Clinician ID and click **FIND**

Last Name	First Name	Clinician ID	Ship To Address	City	State	Zip	
SMITH	MARYANNE	RN TEST 24	2 TWOSOME DRIVE	MOORESTOWN	NJ	08057	Set as Default

- Click on the Clinician Last Name to continue the order
 - If you always order for yourself, within your name, click on link [Set as Default](#)

Choosing the Correct Patient

- Enter a Patient Name or a Patient ID and click **FIND**
- Click on the Patient Last Name to continue the order
- **NO PATIENT** button is only for Routine Clinician supplies, not for Patient Billable supplies

Last Name	First Name	Patient ID	Ship To Address	City	State	Zip
SMITH	MEDICARE	BRK00647767	2 TWOSOME DRIVE	MOORESTOWN	NJ	08057

Choose the shipping address for this replenishment order

- Click on “Ship To Name” – either Clinician’s Address or the Agency Address

Select Ship To Contact Customer Service

Account #60282 (NA) STERLING PHD TE (Home Delivery) Switch Account

Clinician #RN TEST 24 MARYANNE SMITH Set as Default | Switch Clinician

Patient #TESTPATIENTID MARY JONES Switch Patient

Find: in All Fields FIND CLEAR

Select a recently used Ship To Address from the options below.

Ship To #	Ship To Name	Address	City	State	Zip
502286	MARYANNE SMITH	2 TWOSOME DRIVE	MOORESTOWN	NJ	08057

Agency Addresses

(NA) STERLING PHD TE	ACCOUNT*****	8121 10TH AVENUE NO TESTING ONLY	GOLDEN VALLEY	MN	55427
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Displaying Agency Addresses 1 to 1 of 1

Choose the trunk for this replenishment order

- Choose the desired trunk to use from this list. (You may see multiple trunks on this list)

Replenish Trunk Stock Contact Your Account Manager

Trunks - Tips & Help

> Select a Truck to replenish from the list below.

Find Find Clear

Trunk Name	Date Created	Date Modified	Modified By
A TEST TRUNK	9/12/11	9/12/11	JUICRC09

Displaying Replenish Trunk


When the trunk list displays – add items to your replenishment order (cart)

- Use the Find option to search the list of trunk items.
- Use the View all Categories drop down to filter this list by McKesson category
- Use the Sort By drop down to change the sort of the list

Place Trunk Order 'A TEST TRUNK' Contact Your Account Manager


Trunk Name: A TEST TRUNK
Bin: Metal Hinge Jumbo, 27.9 L X 20.6 W X 15.6 H Inch Top, 25.8 L

Find Find Clear View All Categories Sort By Item # View Trunks Go To Cart

- Use the  button to add items to your replenishment order.
- Based on the par levels of your trunk – some items allow you to only add the default quantity while others allow you to change the quantity before adding the item to your replenishment order
- Green message **Patient Billable** will appear on specific items when you have loaded in a Patient

Trunk Name: TEST TRUNK
Bin: CARTON CORRUGATED LG 1/EA REPAIR

Find FIND CLEAR View All Categories Sort By Item # VIEW TRUNKS GO TO CART

Item #	Description	Manufacturer	Mfr #	UOM & Pricing	Par Level	Qty
16182000	BNDG CNFRM PERF 3X4.1YD 1EA/PK 12PK/BG 8BG/CMCK BRAND	MCK BRAND	16-018	BG \$7.46	1	1 

In stock, ships from your local warehouse Patient Billable

- Red message **Billable: Select Patient** will appear on specific items when you have clicked on NO PATIENT
- Routine Clinician supply item lines do not show any message

Trunk Name	Bin					
TEST TRUNK	CARTON CORRUGATED LG 1/EA REPAIR					
Find <input type="text"/>	<input type="button" value="FIND"/> <input type="button" value="CLEAR"/>					
<input type="text" value="View All Categories"/>	Sort By <input type="text" value="Item #"/>					
<input type="button" value="VIEW TRUNKS"/>	<input type="button" value="GO TO CART"/>					
Item #	Description	Manufacturer	Mfr #	UOM & Pricing	Par Level	Qty
16182000	BNDG CNFRM PERF 3X4.1YD 1EA/PK 12PK/BG 8BG/CMCK BRAND	MCK BRAND	16-018	BG \$7.46	1	1 <input type="button" value="+"/>
	In stock, ships from your local warehouse			Billable: Select Patient		
18044101	TOWEL PAPER MULT FLD 250EA/PK 16PK/CS KCLAPC	KCLAPC	01804	PK \$7.58	1	1 <input type="button" value="+"/>
	In stock, ships from your local warehouse					

- Once you add the items to your order – you will see a message that indicates the item is in your cart
- Click to return and choose another available trunk
- Click Go to Cart to view your replenishment items in the cart

When the cart displays – review for accuracy

- Review Clinician, Patient/No Patient & Ship To selections. Click [Switch](#) to make changes
- Click on the highlighted link to go back to your trunk and add more items
- Use the to delete the item and click to make changes to a line item
- Click to submit your order

Trunk #9769285		Contact Your Account Manager						
<input type="button" value="Switch"/> Clinician #TESTNURSE852 SALLY TEST NURSE	<input type="button" value="Switch"/> Patient #123DEMO DEMO, PATIENT	Ship To SALLY TEST NURSE 123 MAIN STREET MOORESTOWN, NJ 08057						
Click here to go back to your Trunk		2 items total \$27.56						
<input type="text" value="All Items (2)"/>		<input type="button" value="Cart Help"/> <input type="button" value="Print Cart"/>						
<input type="button" value="View Trunks"/>	Sort <input type="text" value="Most Recent"/>	<input type="button" value="Cart"/>	<input type="button" value="Delete"/> <input type="button" value="Suspend"/> <input type="button" value="Purchase"/> <input <="" td="" type="button" value="More Options..."/>					
Item #	Description	Manufacturer	Mfr #	UOM	Price	Qty	Total	Delete/Edit
10711400	OINT CALMOSEPTINE 2.5OZ 12EA/BX CALMOSEPTI	CALMOSEPTI	00799000102	EA/1	\$10.89	1	\$10.89	<input type="button" value="Delete"/> <input type="button" value="EDIT"/>
			A6250					
10502000	TELFA DRSG NADH 3X4 ST 50EA/BX 18BX/CS KENDALL CO	KENDALL CO	1050	BX/50	\$16.67	1	\$16.67	<input type="button" value="Delete"/> <input type="button" value="EDIT"/>


Step 1 – Billing, Shipping, PO, Email & Comments

- A Purchase Order Number is required
- Review the Bill To and Ship To information. If not correct – click [Switch](#) to correct
- To receive an Email Order Confirmation – click “Use my email”
- If episode is required – choose it from the drop-down list or enter the data into the field
- Click the button to proceed

<p>Enter purchase order number or name (Required)</p> <input type="text" value="TRUNK LJ"/>	<p>Order Summary</p> <p>Cart # 74303831</p> <p>PO/Name Enter PO/Name</p> <p>Date 05/14/2019</p> <p>Total \$5.37</p> <p><input type="button" value="CONTINUE TO NEXT STEP"/></p>
<p>Episode</p> <input type="text"/> <small>Episode is limited to 20 characters</small>	<p>Clinician Switch</p> <p>#RN TEST 24 MARYANNE SMITH</p>
<p>Email order confirmation to Use my email</p> <input type="text"/> <small>Separate multiple addresses with spaces, commas, or semi-colons.</small>	<p>Patient Switch</p> <p>#TESTINSPT JONES, INSURANCE PATIENT</p>
	<p>Ship To Switch</p> <p>#502251 JONES, INSURANCE 2 TWOSOME DRIVE MOORESTOWN, NJ 08057</p>

Step 2 – Order Review

- Review your order. When ready to send the order – click

Okay, We've got everything we need. Click Place Your Order.			
1 In stock item - Ships from your warehouse network			
1 Total item			
Order Line Items	UOM	Price	Qty Total
11111300 GLOVE VNL PF SM NS 100EA/BX 10BX/CS MCK BRAND MCK BRAND #14-114	BX/100	\$5.37	1 \$5.37
 In stock, ships from your local warehouse	ICD	A4927	
<p>Order Summary</p> <p>Cart # 74303831</p> <p>PO/Name TRUNK LJ</p> <p>Date 05/14/2019</p> <p>Total \$5.37</p> <p><input type="button" value="PLACE YOUR ORDER"/></p>		<p>Clinician</p> <p>#RN TEST 24 MARYANNE SMITH</p> <p>Patient</p> <p>#TESTINSPT JONES, INSURANCE PATIENT</p> <p>Ship To</p> <p>#502251 JONES, INSURANCE 2 TWOSOME DRIVE MOORESTOWN, NJ 08057</p>	