

# Ordering Controlled Substances in Oracle

## Introduction

Welcome to Ordering Controlled Substances at UAB. This job aid is a companion to the Controlled Substances course which is required for all who order and work with controlled substances at UAB.

It is **not** designed to teach you how to create a requisition in Oracle. If you have **never** created a requisition in Oracle, please take the **Requisitions and Payment Requests** course offered via the [Learning System](#) first.

## The Requisition and Its Contents

### Creating the Requisition

1. Log into Oracle as you normally would to create a requisition.
2. Create a New Requisition.
3. Once you have created a new requisition, you will see that some of the fields have been auto-filled for you.

Requisitions - [New]

Operating Unit: **UAB Operating Un**

Number:

Type: **Purchase Req**

Status: **Incomplete**

Preparer: **Your Lastname, Firstname**

Total: **USD 0.00**

Lines

Num	Type	Item	Rev	Category	Description	UOM	UOM C
<input checked="" type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

Destination Type:

Requester:

Organization:

Location:

Subinventory:

Source:

Supplier:

Site:

Contact:

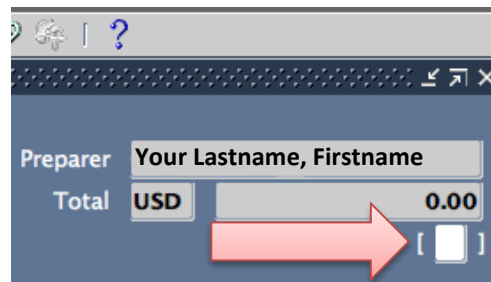
Phone:

Buttons: **Catalog...** **Distributions** **Approve...**

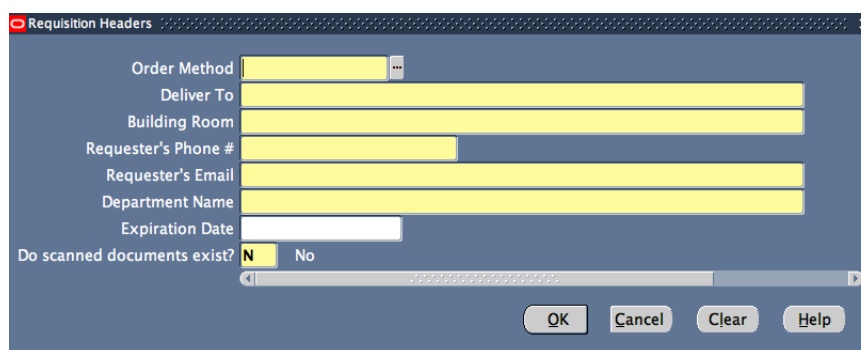
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## The Requisition Headers Box

- Before you complete any fields on this screen, click in the little white box enclosed by brackets under the total amount field located on the top right of the screen.



- Clicking inside this box opens the Requisition Headers box shown below. You must complete each field that is yellow. (**NOTE:** There will not be any scanned documents so it will always be **N**.)



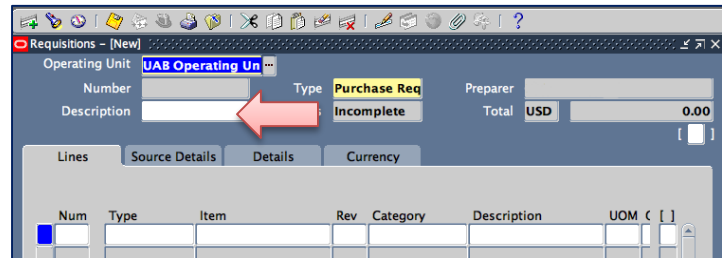
- Enter the Order Method as **Phone**. (Fax or email will **not** be accepted.)
- Enter your name or the person's name who will pick up the order from OH&S in the Deliver To field.
- Enter the building room where the Controlled Substances will be stored.
- Enter your phone number, e-mail address, and department name if you are the one who will be picking up the order. Otherwise, enter that person's information.
- An Expiration Date is not necessary.
- Controlled Substances are not delivered to you, but to OH&S for distribution.
- Click OK to save this information and return to the main page.

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## The Description

13. Next, click in the **Description** box at the TOP of the screen.

- a. While entering information in white fields is not always necessary, it can make ordering, correcting, and receiving your order easier both you and OH&S.



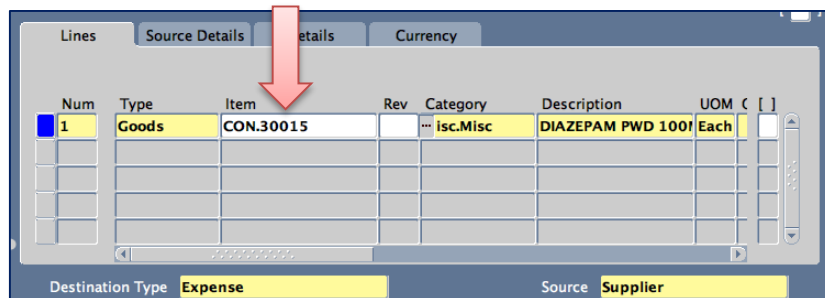
for

- b. Enter a brief description in this box - your name, the project name, or something that will remind you about this order just in case OH&S needs to contact you or refer to the order.

## The Con Number, Description, and Catalog Number

14. Down below in the Item box, enter your Con number. It can be found on the OH&S website as **Ordering CS – How to requisition CS online, step 2** (PDF file – [CONTROLLED SUBSTANCES CON. ITEM NUMBERS](#))

15. Type the three letters **CON** and a period followed by the CON.Number on the PDF file. (See the example shown below.)

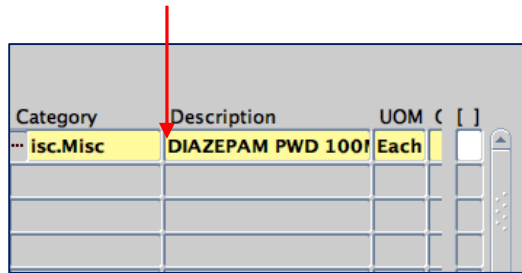


16. Press the tab or the enter key after typing in the CON.Number. You should see the category, description, and Unit of Measurement (UOM) fields autopopulate.

17. Click *in front of the name of the drug* in the yellow description field.

**NOTE:** Take care not to delete the description that is autopopulated in the field! You will need that!

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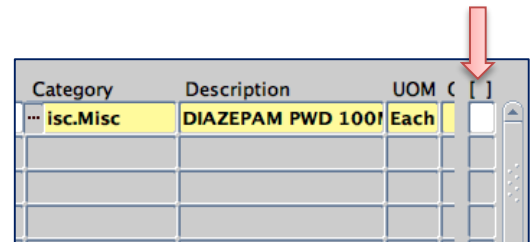


Category	Description	UOM	⌵ ⌶
... isc.Misc	DIAZEPAM PWD 100!	Each	

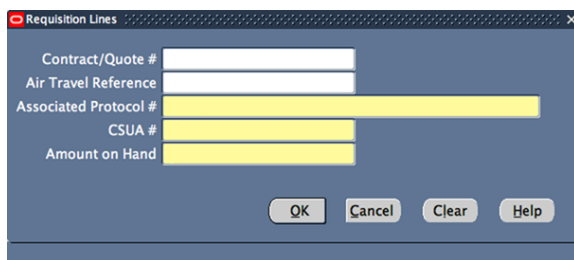
18. Enter the Catalog number that is found in the PDF [Catalog Numbers by Vendor](#) step #3 on the Ordering CS webpage *in front of the autopopulated description name!* Do not remove the autopopulated description!
19. This Catalog number **must** be entered in front of the name of the substances so that your order will be approved. (**Example:** D0899 – would go in front of the word **DIAZEPAM** – D0899 DIAZEPAM PWD 100M.)

## The Requisition Lines Box

20. Click in the little white box enclosed by brackets next to the UOM field.
21. This will open the Requisition Lines box.



Category	Description	UOM	⌵ ⌶
... isc.Misc	DIAZEPAM PWD 100!	Each	



Requisition Lines

Contract/Quote #

Air Travel Reference

Associated Protocol #

CSUA #

Amount on Hand

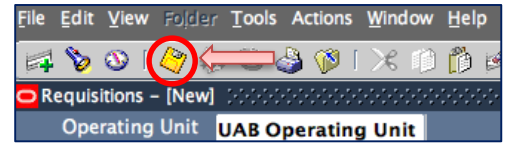
OK Cancel Clear Help

22. In the **Associated Protocol #** (APN) field, enter your associated protocol number. This is a required field.
23. In the **CSUA #** field, type in your Controlled Substances User Authorization number.
24. In the **Amount on Hand** field, type in the amount that you currently have on hand of the substance. This should match your current inventory.

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25. Click **OK**. This should return you to the requisition main screen.

26. **SAVE YOUR WORK** by clicking on the yellow floppy disk icon located at the top of the screen.



27. Scroll over and click in the Quantity field to enter the number of items.

Num	Category	Description	UOM	Quantity	Price	Need-By	
1	lisc.Misc	Cat 1234 DIAZEPAM	Each	2	26.67		

28. Enter the price found on the [UAB Controlled Substances Program – Catalog Numbers by Vendor](#) PDF file

- WARNING:** Controlled substances prices go up and down like gasoline prices. On any given day, the price you enter can go up or down a few cents or even double. Please be aware of this **before** you place the order.
- In some instances, it may be important on a grant that the price entered be an exact amount. Please understand if your price is different from the price at the time, it is will be reviewed before it is approved. OH&S will then return your requisition for correction. All you have to do is change the price and send it again.
- If the price is different and the requisition has been approved, OH&S will cancel the requisition. This means that you will have to start over again with a new requisition for the same controlled substances that you were ordering.

## Destination Type and the Supplier

29. Click inside the Destination Type field located near the bottom of the screen. This field, as well as the Requester and Source fields, should be autopopulated.

30. Move your cursor into the Organization field, and click on the three dots (known as the list of values or LOV).



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31. Once you click on the LOV, the field should autopopulate.

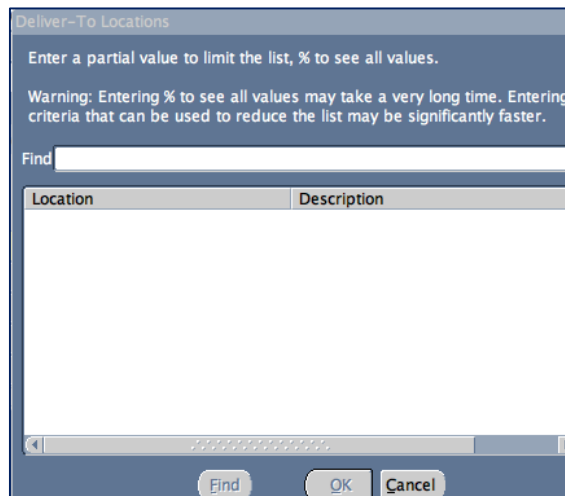
32. In the **Location** field, click on the LOV. You should see this box.

33. Click in the **Find** field, and enter a percent sign (%) followed by the letters **del**. It should look like this **%del**.

34. Click **Find**.

35. When the Location, **Deliver to Dept**, appears, select it.

36. Click **OK**.



Deliver-To Locations

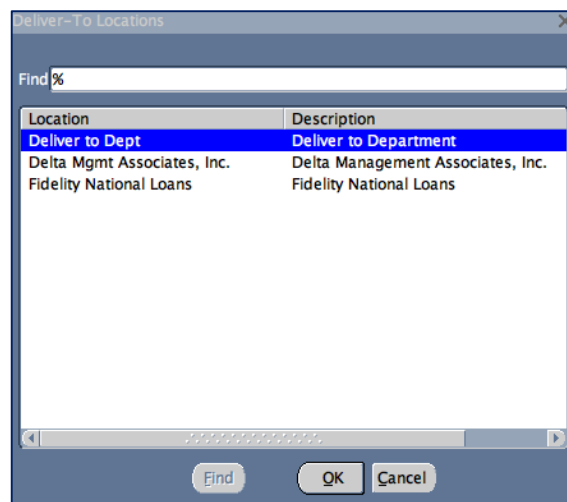
Enter a partial value to limit the list, % to see all values.

Warning: Entering % to see all values may take a very long time. Entering criteria that can be used to reduce the list may be significantly faster.

Find: %del

Location	Description
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Find OK Cancel

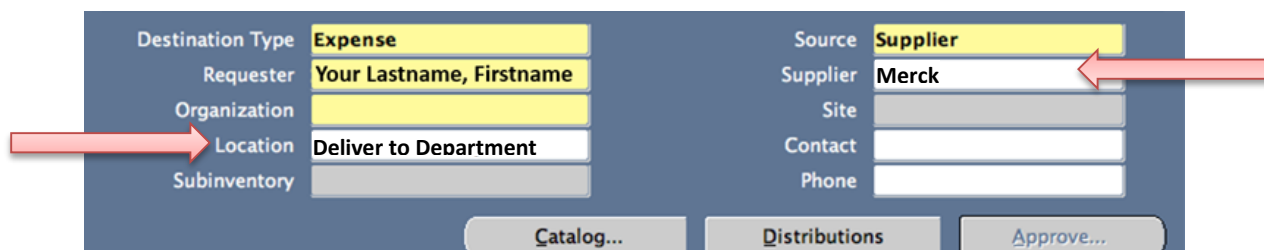


Deliver-To Locations

Find: %

Location	Description
Deliver to Dept	Deliver to Department
Delta Mgmt Associates, Inc.	Delta Management Associates, Inc.
Fidelity National Loans	Fidelity National Loans

Find OK Cancel



Destination Type: Expense

Requester: Your Lastname, Firstname

Organization:

Location: Deliver to Department

Subinventory:

Source: Supplier

Supplier: Merck

Site:

Contact:

Phone:


Catalog... Distributions Approve...

37. Move to the **Supplier** field, and enter the Supplier name.

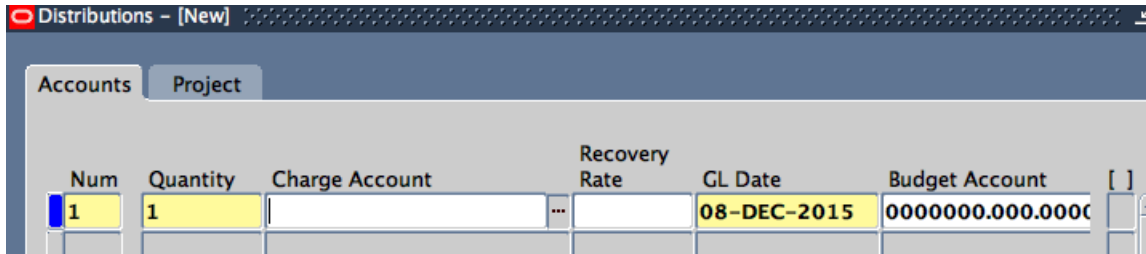
- Sometimes this field may auto-populate,
- However, please make sure that it is filled it correctly. The Supplier name is an important part of your order.

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## Distributions

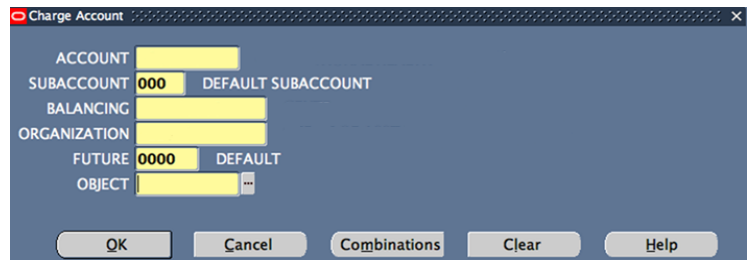
38. Click on the Distributions button  at the bottom of the screen

39. The Distributions screen will appear (see below).



40. Enter the charge acct number.

41. Press Enter. You should see the new box popup.



**NOTE:** Your account numbers should autopopulate. If not, please make sure that you enter them correctly to ensure the approval of your order.

42. Enter the object code for Controlled Substances. The code is **8204099**.

43. Click OK.

44. This will take you back to the Distributions Account page.

45. **TO SAVE YOUR REQUISITION** – Click on the icon of the floppy disk at the top of the screen.