Instructions for Using Equipment Inventory in KWIC

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Equipment Inventory

- The Equipment Inventory is a functionality in KWIC that allows Local Agencies (LA) and State Agency (SA) to track non-technology and technology equipment purchased using WIC funds. This Inventory will be maintained by each LA per the following policies and form, effective November 1, 2016:
  - ADM: 02.03.06 Equipment Inventory
  - ADM: 02.03.07 Disposal, Transfer and Deletion of Equipment
  - ADM: 03.01.00 Record Retention Requirement
  - Local Agency Inventory Worksheet

- The Equipment Inventory can be found under the Clinic Admin menu and the Equipment Inventory Report can be found under the Reports menu. Certain functions will be limited based on security roles in KWIC, which will be outlined in this training.

Getting Started

Find Screen

- To access the Equipment Inventory, any user that has access to Client Services will need to go to the Clinic Admin menu and select Equipment Inventory. Once Equipment Inventory is selected, it will open to the Find Equipment Inventory Screen.

- As you can see, you have several ways to search for items in your inventory. You will also notice here, that unless you have the clearance of KWIC Administrator, your Add button will remain disabled. This function is limited to only persons with KWIC Administrator security clearance for the clinic. We will
cover adding equipment to the inventory later on in the document. Below is a screenshot of Clerk access to demonstrate the Add button being disabled.

![Screenshot of Clerk access to demonstrate the Add button being disabled.](image)

- None of the fields are required to be completed in order to search your inventory, however the more information you complete, the quicker the system will be able to search through your inventory and return the results you are looking for. The field options to search by are:

  - **Agency Name**
  - **Clinic Name**
  - **Property Number**
    - This is the KDHE property sticker number
  - **Item Type**
  - **Is Currently being used**
    - Check box is defaulted to checked and show only those items currently in use. You can deselect the box and the results will return all items, currently in use and those items that are not currently in use as well.
  - **Last Physical Inventory Completed**
    - Date the last inventory was completed for the item(s)
  - **Transfer Status**
    - This will allow you to find any equipment that might be in transit to your clinic or received by your clinic.
  - **Inventory Location**
    - Radio button is defaulted to current clinic location. You can select “History of all locations” and the system will list all clinics and the equipment that has ever been inventoried. (Example screenshot below has History of all locations selected so you can see one piece of equipment’s history).
- Once you have selected the criteria that you would like to search by, select the Find button and the following columns of information will be listed on the screen below if results are returned. Some columns might be blank with information, such as Transfer Status, if there are no data in that field on the equipment’s record:
  - Item Type
  - Property #
    - This is the KDHE property sticker number
  - Transfer Status
  - Purchase Date
  - Date Received
  - Location
    - This is the clinic location

**Equipment Inventory Detail Screen**

- After selecting Find, select the item you would like to pull up and click the Retrieve button, or double click on the item. By doing this, the system will pull up the item’s Detail screen.
Here you will see all the information that was entered into your inventory about this item. The detail screen lists:

<table>
<thead>
<tr>
<th>Clinic Name</th>
<th>Item Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property #</td>
<td>Description</td>
</tr>
<tr>
<td>- This is the KDHE property sticker number</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transfer Status</th>
<th>Location in Clinic</th>
</tr>
</thead>
<tbody>
<tr>
<td>- This will be automatically populated by the system if the equipment is in the process of being transferred or once received.</td>
<td></td>
</tr>
<tr>
<td>- This would be where the item is located in your clinic, example Exam Room, Clerk’s desk, etc.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Serial Number</th>
<th>Purchase Date</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Received Date</th>
<th>Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>- In Working Condition</td>
<td></td>
</tr>
<tr>
<td>- Not Working</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Currently in Use</th>
<th>Note</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Original Cost</th>
<th>Funding Source</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Percent WIC</th>
<th>Date Physical Inventory Completed</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Disposal Date</th>
<th>Disposal Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Broken</td>
<td></td>
</tr>
<tr>
<td>- No Longer Needed</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Disposed Equipment Disposition</th>
<th>Transfer to Another Clinic link</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Recycled</td>
<td></td>
</tr>
<tr>
<td>- Disposed by county IT</td>
<td></td>
</tr>
</tbody>
</table>
• The Equipment Inventory is meant to be a working inventory, so certain fields are able to be updated after the equipment has been added the first time. Any user that has access to Client Services will be able to update these fields. These fields that can be updated once the record has been retrieved are:

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Property #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Serial Number</td>
</tr>
<tr>
<td>Location in Clinic</td>
<td>Purchased Date</td>
</tr>
<tr>
<td>Condition</td>
<td>Currently in Use</td>
</tr>
<tr>
<td>Received Date</td>
<td>Original Cost</td>
</tr>
<tr>
<td>Note</td>
<td>Percent WIC</td>
</tr>
<tr>
<td>Funding Source</td>
<td>Transfer to Another Clinic link</td>
</tr>
</tbody>
</table>

• Like most screens in KWIC, once you make a change, the Save button will become enabled and you must select it in order to save your changes. If you wish to discard any changes you have made, select the Cancel button.

• If these fields have not been filled in before, you will be able to complete the following when needed:
  o Disposal Date
  o Disposal Reason
  o Disposed Equipment Disposition

• The Date Physical Inventory Completed field is able to be filled in on the Detail screen as well as by another field on the Find Screen, which we will go through that process later in the document.

Adding to the Equipment Inventory

• This portion will only pertain to those individuals with KWIC Administrator clearance. If you do not have this clearance, please skip to the next section.

• To add a new piece of equipment to your clinic’s inventory, you will need to first retrieve the inventory, by going to the Clinic Admin menu and select Equipment Inventory. Once the Find screen is open, you will see the fields to search through your inventory as well as four buttons to the right, Find, Clear, Retrieve, and Add. To start, click on Add. Refer to Find Screen screenshot for an example of the screen.

• The Add screen fields are the same as the Detail screen fields previously listed, however there are certain fields that you must complete in order to save the record. If you do not complete all of the required fields, the Save button will remain disabled and you will not be able to add the item into your inventory. The following required fields will be marked with the usual red asterisks that you are used to seeing in the system, but they are also listed below for quick reference:
  o Clinic Name
  o Item Type
    ▪ What the item is. (Desktop, laptop, printer, etc.)
  o Property #
- This is the KDHE property sticker number.
  - Description
    - A brief explanation of what the equipment is. (Please include **Brand, model number**, etc.)
  - Purchase Date
    - When the item was purchased. The system will default this to today’s date for you. You are able to change this date to the actual date of purchase.
  - Received Date
    - When the item was received. The system will default this to today’s date for you. You are able to change this date to the actual date of receipt.
  - Condition
    - Condition of the item. (In Working Condition, In need of repair, etc.)
  - Original Cost
    - Amount of the item.
  - Funding Source
    - What funds were used to purchase it? (WIC, Other Program, etc.)
  - Percent WIC
    - Percentage of WIC funds used to purchase it. (50%, 100%, etc.)

- There are a few other fields that if you have the information to complete them, you should go ahead and fill them in at this time. The more information you have on a piece of equipment, the better. The fields that are not required to save the record, but should be completed if they can be are:
  - Location in Clinic
    - Where the item will be located in the clinic. (Clerk’s desk, Exam room, etc.)
  - Serial Number
    - Enter if the item has a manufacturer’s serial number.
  - Note
    - Anything that might need to be known about the equipment.
  - Currently In Use
    - Is the item in use? (Yes, No). The system defaults this to Yes for you.
• Below is a blank Add screen so you can see what it looks like.

![Equipment Inventory Detail](image)

• Once you have completed all the fields for the item, you can go ahead and select the Save button. The item is now in your Equipment Inventory. If for some reason after you select save and you realize you have entered something on that record in error, you may retrieve the record and correct the information the same day the record was created. After that initial day, only certain fields are editable. If what you need to change is not one of the editable fields listed under the Detail screen above, you will need to follow the process detailed in policy ADM: 02.03.07 Disposal, Transfer and Deletion of Equipment to have the SA delete the incorrect record. Once it is deleted, you will then need to repeat the process above and add the equipment back into your inventory.

**Update Physical Inventory Date Link**

• On the Find Screen, there is a link next to the Find button named, “Update Physical Inventory Date”. Any user that has access to Client Services will have access to this link. When this link is selected, a new window will open up named, “Physical Inventory Completed”.

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As you can see, on the left hand side of the window, there is one mover box named, “Equipment Assigned to Clinic”. This lists all equipment that is in your clinic’s inventory by Item Type and Property #. After you have completed your physical inventory of your items, this is where you will come to mark the equipment that you have completed your inventory if you are doing more than one item. You can select certain items, or all items by using the arrows between the two mover boxes and moving the items to the right mover box, named, “Items Inventoried”.

Once you have moved all the items that you have physically inventoried, you will then enter the date in the date complete box above. The date will default to the current date, so if the date the inventory was completed was prior to the current date, you will need to change it and then select “Ok”. One thing to keep in mind is the date cannot be in the future. The system will not allow a future date in this box.

By selecting “Ok”, you have just applied the date entered to the Date Physical Inventory completed field for each item that you moved to Items Inventoried mover box. If you retrieve one of the item’s detailed screen that you had moved over, you will now see the Date Physical Inventory completed field has been filled in.
Transfer to Another Clinic Link

**Sending Equipment:**

- One feature with the Equipment Inventory is the ability to transfer equipment from one clinic’s inventory to another clinic’s inventory. Any user that has access to Client Services will have access to this link. To begin this process, retrieve the detail screen of the piece of equipment you would like to transfer.

- Once the detail screen is up, you will see a “Transfer to Another Clinic” link at the bottom right of the screen. Click on this link.

- After selecting the link, a Transfer Pop up screen appears. This is where you will select the clinic you would like to transfer the equipment to. Once you have selected the clinic in the dropdown, select the “Ok” button.
By selecting “Ok”, you have now initiated the transfer to the other clinic. The system will automatically change the Transfer Status to “In Transit” and close the Detail screen and returned you to the Find screen.

When the receiving clinic receives the equipment and completing the transfer, all fields of the detail screen will transfer with it.

**Receiving Equipment:**

- Only after you have **physically** received the piece of equipment that has been transferred to your clinic, can you then go into your Equipment Inventory and retrieve the item to mark it received and update the few necessary fields. **Do not** complete this part prior to physically receiving the equipment in case something happens to the equipment while it is in transit.

- Now that the equipment has finally arrived, you will need to bring up the Find screen in your Equipment Inventory. You can then search by “Transfer Status” and select “In Transit”, then select the Find button. When the item you have just received shows as an available item to select, either double click on the item or highlight and select the Retrieve button.
• Once you have retrieved the record, you will notice that there is a new link on the bottom right called “I have received this item”. Click this link so the system will automatically update the Transfer Status to “Received” and it will also enter today’s date in the Received Date field. All that is left for you to do in order to save the record is to update the Condition of the item.

• After the link has been selected and the Condition updated, you may enter any notes about the equipment if needed and where the equipment is located in the clinic, however it is not required in order to Save the record. Select Save and the equipment receipt will be completed and will now be in your clinic’s inventory as received.

Special note: If the SA will send the equipment from the SA to the LA, the SA will initiate a transfer in the KWIC Equipment Inventory. Upon receiving the equipment, the receiving LA will then retrieve the item in their KWIC Equipment Inventory and mark the item as received.
Disposing Equipment

- If you have equipment in your inventory that you need to dispose of, you will need to follow policy ADM: 02.03.07 Disposal, Transfer and Deletion of Equipment like you currently do. Once you receive the approval to dispose of the equipment by your State lead, you will need to retrieve the item from your Equipment Inventory.

- Go into your Equipment Inventory and search for the equipment that you have the approval to dispose of by using the Find screen. Once the search results have returned, either double click on the correct record or highlight it and select the retrieve button.

- Once you have the item’s detail record open, towards the bottom of the screen you will see three fields:
  - Disposal Date
  - Disposal Reason
  - Disposed Equipment Disposition

- You will need to enter the Disposal date, Disposal Reason, and the Disposed Equipment Disposition from the dropdown, as well as update the Currently in Use to “No”. Once you have completed the necessary fields for that equipment, select Save and the equipment has now been updated in your inventory as disposed.

- Disposed items will remain in the inventory according to ADM: 03.01.00 Record Retention Requirement. There will be an annual removal initiated by SA staff to remove appropriate records.
Deleting Equipment Records

- If an error occurred when adding equipment into your inventory and you did not get it corrected the same day the record was created, and it is not one of the editable fields, you will need to follow policy **ADM: 02.03.07 Disposal, Transfer and Deletion of Equipment**.

- Only the SA has access to delete records from a Local Agency’s inventory. After following the policy, if it is decided the record should be deleted, the SA will delete the equipment record and notify the requesting Local Agency once it has been completed.

Equipment Inventory Report

- To access the Equipment Inventory Report, any user that has access to Client Services can go to the Reports menu and select the Equipment Inventory Report. Once selected, the report will open and you will enter criteria in order to run the report depending on the information you want.

- The report criteria that you can use to run the report are:
  - Agency
  - Clinic
  - Item Type
  - Received Dates range
  - Inventory Dates range
  - Is Currently being used
    - Default is to come in checked
    - If you would like to find the equipment that is not currently being used, you must uncheck this box
  - Most Recent Clinic Location
    - Default is to come in checked
    - If you would like to see the history of all locations, you must uncheck this box

- After you have selected any of the options you would like to use to run the report, select Generate and the report will run. If there are results to be returned, they will be listed as shown in the next screen shot.
• The columns that will be displayed on the report as well as the data if the fields are populated on the detail screen for the item(s), once results are returned are:
  o Agency
  o Clinic
  o Description
  o Item Type
  o Location in Clinic
  o Serial Number
  o Property Number
  o Purchased Date
  o Received Date
  o Used
    ▪ Will be displayed as Yes or No
  o Condition
  o Physical Inventory Dt
  o Disposal Date
  o Disposal Reason

• This report will have the standard Save As function to allow you to save the report if you would like. It will also have the standard Print function to allow you to print the report off. You can Clear the results and rerun the report with different criteria.