ORDER HISTORY

DSSI USER GUIDE

ORDER HISTORY
FIND ORDERS AND ORDER STATUSES

After placing an order on DSSI, click the **Order History** button on the blue navigation bar to find your orders and their statuses. Everyone's most recent orders, with any status, for any supplier, for any of your locations will always initially appear.

FILTER THE ORDERS

Use the filters to narrow your results.

- Use **Filter by Status** to choose one *or more* order statuses. Either search for a status OR pick from the drop-down list of statuses. For example, pick **Cancelled Lines** and **Backordered Lines** to quickly see orders you need to take action on.
- Use **Filter by Supplier** to search for *one* supplier by name. (Only a handful of your suppliers will be in the drop-down list.)
- Use **Filter by Location** to choose one *or more* of the locations you have access to. Either search by a location's name or ID# OR pick from the drop-down list of locations.
- Finally, use the **All Orders** to instead choose **My Orders** if you'd only like to see *your* orders and not everyone else's orders at your location(s).

SEARCH FOR AN ORDER

Use the search box to search for an order by partial order number.

VIEW AN ORDER'S LINE-LEVEL STATUSES

Select any order to view the specific line-level statuses sent by the supplier.

CONTACT VENDORS OR APPROVERS

- Once an order has been submitted for fulfillment you *cannot* edit it on DSSI. Therefore, directly contact the **vendor** to make changes to it, cancel it, add products to it, etc.
- If you have questions about an order that is **Pending Approval** or was **Denied**, please contact the **Approver**.

Note: Orders not placed on DSSI will have an "A" in the PO # sequence.

ORDER HISTORY
FIND CANCELLED AND BACKORDERED ITEMS

DIRECT SUPPLY® DSSI™

After clicking the **Order History** button on the blue navigation bar to find a PO, then select any PO to view the specific line-level statuses sent by the supplier, including delivery dates and tracking information, when available.

If a PO's status has **Cancelled Lines** or **Backordered Lines**, the *PO Detail* page will show you the individual lines that are cancelled or are on backorder and, when sent by the supplier, it will also display the Estimated Ship Date.

CONTACT THE VENDOR

If you have any questions about cancelled or backordered lines, the Estimated Ship Dates, or the order in general, please contact your vendor.

QUICK TIPS

- The **Supplier Reference Number** can be found on the *PO Detail* page.
- A **Capital Requisition Number** can be found on the *PO Detail* page.
- Orders not placed on DSSI will have an "A" in the PO # sequence.

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ORDER HISTORY
FIND INVOICES AND INVOICE STATUSES

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Click the **Order History** button on the blue navigation bar to find any invoice and its status. All recent invoices, with any status, for any supplier, for any of your locations will always initially appear.

FILTER THE INVOICES

Use the filters to narrow your results.

- Use **Filter by Status** to either search for a status OR pick from the drop-down list of statuses.
- Use **Filter by Supplier** to search for *one* supplier by name. (Only a handful of your suppliers will be in the drop-down list.)
- Use **Filter by Location** to choose one *or more* of the locations you have access to. Either search by a location's name or ID# OR pick from the drop-down list of locations.

SEARCH FOR AN INVOICE

Use the search box to search for an invoice by partial invoice number.

VIEW THE DETAILS OF AN INVOICE

Select any invoice to go to the *Invoice Detail* page and view the related PO(s), the Remit To address, as well as the line-level details, including any line-level tax information.

CONTACT THE VENDOR

If you have any questions about an invoice, please contact your vendor.

ORDER HISTORY
RETRIEVE ORDERS SENT FOR APPROVAL

ORDERS IN A "PENDING APPROVAL" STATUS

As long as an order is still in the approval process and hasn't yet received that final "stamp of approval" from your Approver(s), you have a limited amount of time to retrieve that requested order before it gets to the vendor.

To do so, follow these instructions:

- Select **Order History** from the blue navigation bar.
- Filter by the **Pending Approval** status to find your requested order.
- At this point, you can either take back the requested order to edit it *or* permanently delete it altogether.
  - **EDIT ORDER:** Use this button to remove the requested order from the approval queue *and* move the entire order back into your Cart so you can make changes to it, add products, remove products, etc.
  - **CANCEL ORDER:** Click this button to remove the requested order from the approval process *and* permanently delete the order altogether.

IN APPROVALS	Purchase Order DMONT0000003492	submitted by Misty Brum on Sep 9, 2020 at 4:39 PM CDT

		Shipping Address	
Total	$146.83		✖ Edit Order
Location	6767 - DMO DSSI Test site	DMO DSSI Test site	✖ Cancel Order
Storage Location	HMB01 6767 PMH PULMONRY	6767 Industrial Rd.	🖶 Print Purchase Order
Supplier	Direct Supply	Milwaukee, WI 53223	

Line Items

NO TRACKING INFORMATION

Product Name	Brand / Manufacturer	Product #	Manf #	U/M	Unit	Qty	Extended
CanDo® Slim® WaTE™ Bar Set, 5 ... GL: 9997 - Nursing - Supplies Processing	Fabrication Enterprises	81832	N/A	ST	$71.98	1	$71.98
CanDo® WaTE™ Ball Set, 6 Pieces GL: 9997 - Nursing - Supplies Processing	Fabrication Enterprises	06488	N/A	ST	$51.98	1	$51.98
CanDo® Digi-Squeeze Hand & Fin... GL: 9997 - Nursing - Supplies Processing	Fabrication Enterprises	06476	N/A	ST	$15.98	1	$15.98

CONTACT VENDORS OR APPROVERS

- Once an order has been submitted for fulfillment, directly contact the **vendor** to make changes to it, cancel it, add products to it, etc.
- If you have questions about an order that is **Pending Approval** or was **Denied**, please contact the **Approver**.

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ORDER HISTORY
ADD A PREVIOUS ORDER TO THE CART

Use the **Reorder Products** button to reorder the same exact items in the future. Note: It <u>cannot</u> be used to edit, tweak, cancel, or add items to an *existing* order.

ADD ORDER TO CART

- Click **Order History** from the blue navigation bar.
- Use the filters or the **Search** box to find the desired order.
- Choose the hyperlink for the order to go to the *Purchase Order Detail* page.
- Click **Reorder Products** to add the *entire* order to your Cart.

At this point, you'll be automatically redirected to your Cart. Review the products and make any updates to them before you continue adding more products or begin the checkout process.

If you submit the order it is <u>NOT</u> editing your existing order; it is re-submitting the entire order.

CONTACT THE VENDOR

If you need to edit an order you already submitted, directly contact the <u>vendor</u> to make changes to it, cancel it, add products to it, etc.

Home > Order History > Purchase Order 70609

COMPLETE Purchase Order 70609 submitted by Stephen Finigan on Sep 2, 2020 at 4:42 PM CDT

Total	$494.78		
Location	Oaks	Shipping Address	**+ Reorder Products** ⓘ
Supplier	Office Depot		*You will have the opportunity to review this order before it is submitted.*
Supplier Ref #	810015	Oaks	
Related	INV 1001015	63 Oaks Dr N	🖶 Print Purchase Order
Delivery Date	9/10/2020	Bury, CA 91010	

Line Items   🚚 VIEW TRACKING INFORMATION

Product Name	Brand / Manufacturer	Product #	Manf #	U/M	Unit	Qty	Extended
ROHO® MOSAIC Cushion with Sta... GL: 6800-425 - CHARGEABLE MEDICAL... Complete	ROHO - Crown Incorpor...	3JV61	MOS1816CA	EA	$57.98	2	$115.96

ORDER HISTORY
REVIEW RSI ON INVOICES

Invoices with Resident-Specific Information (RSI) allow you to connect a product or service to a specific resident by including their Protected Health Information (PHI) when processing the electronic invoices while in accordance with HIPAA regulations.

Resident-Specific Items on DSSI invoices are designated with an RSI "pill". Users who have been granted RSI access will be able to view the PHI for each item. Users without access will not.

USERS WITH RSI ACCESS

If you have been granted access to view RSI on invoices, you will see any additional details that the vendor provided. You can then **Collapse/Expand All RSI Details**. To organize by patient, change the **Group By** sort method to **Patient Data** and you'll see each patient and their corresponding subtotal as seen here.

USERS WITHOUT RSI ACCESS

If you have not been granted access to view RSI on invoices, you will see the following message for *DSSI invoices*. If your organization uses DSSI Capture to process off-system invoices, you will not see any RSI "pills" or messages and if you try to **Download PDF**, you'll receive a slightly different message.

If you think you should have rights to view Resident-Specific Information, please contact your Help Desk.

ORDER HISTORY

## RESOLVE US FOODS ORDER AVAILABILITY EXCEPTIONS

DIRECT SUPPLY DSSI®

Instead of calling US Foods, resolve out-of-stock and blocked product issues and delivery day changes ONLINE!

Prior to your cutoff time for delivery, use the **Click Here** link on your PO screen to be directly taken to the US Foods Order Exception Resolution System and resolve any issues there.

IF THERE ARE OPEN EXCEPTIONS WITH THE ORDER

1. If there are open exceptions, you'll be taken to the **Resolve Exceptions** screen to resolve the issues.

2. It will show you products that need your immediate attention and, when available, will identify options that you could choose to use as substitutions.

3. As you review your exceptions, the screen will display the number of issues left to resolve.

4. The **Submit** button will be disabled until all exceptions are cleared, at which time, it will become clickable.
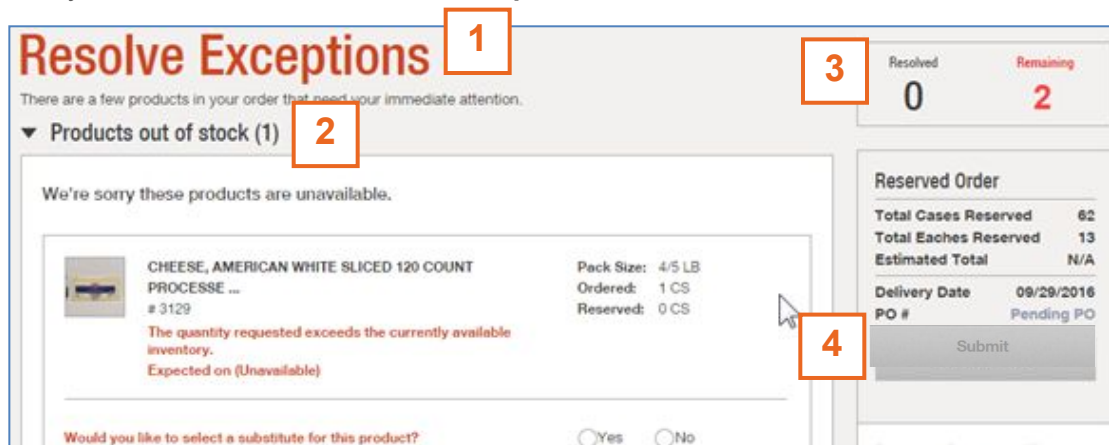
IF THERE ARE NO OPEN EXCEPTIONS WITH THE ORDER

1. If there are no open exceptions with the order, you'll be taken to the **Order Confirmation** screen where you can review your order, make edits to it, and even cancel it.

2. This screen confirms your order has been submitted and displays your **Order #**.

3. To make edits to your order, click the **Edit Order** button.

4. To completely cancel the order, click the **Cancel Order** button.
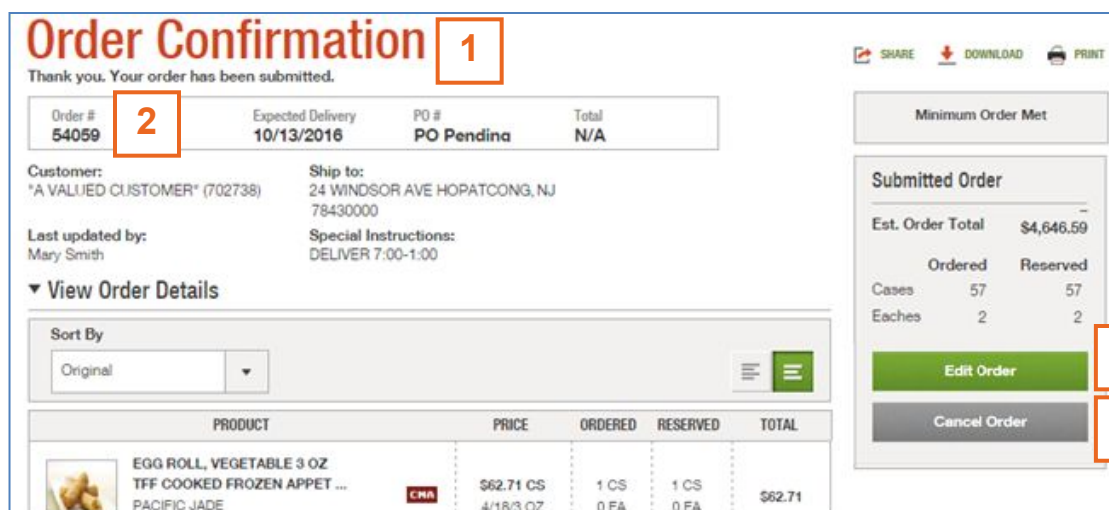
QUICK TIPS

1. USF analyzes order exceptions only within 48 hours of delivery. If you place an order before then, use the link on the DSSI PO page to go to the USF site and review your order and resolve any new exceptions.

2. When order exceptions are resolved on the USF system, DSSI is not updated, so continue to use the link to USF for the most accurate information about your order. The link will be displayed on your DSSI PO page until your cutoff time for delivery.

3. If you have any questions or issues with the USF site, please contact US Foods directly.

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