

Short Term Loan

User Notes

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Versions

What	When	Who
Revised Move process (implemented Sept 2020)	March 2022	Liz Webster

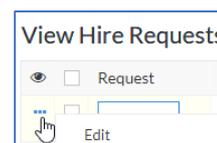
Requests

Create a Request

1. Dashboard > Request
2. Click Add 
3. Click in the Client field and search by and select NHI or click Add New to create a new record
4. Enter the Request Type
 - a. If the Request Type is ACC, you will need to record the ACC45 number and Client Discharge Date
5. Dates – default to current but can be changed if you wish
6. Assessor – Click to search for another Assessor name if completing this on behalf of the Therapist
7. Select Urgency
8. Items > Add New
 - a. Select a Category from the menu
 - b. Catalogue Item – search by typing part of the description or model code
 - c. Select Ship To from the 
9. Delivery instructions – or to record the barcode if it is already issued.
10. Click Save as Draft
11. To create a Dispatch record, click [Request](#)
12. Click Yes to confirm Request

Edit a Draft Request

To edit the request while still in Draft:



1. Hover to the left of the request and click the blue dots, then click Edit.
2. Make any changes required
3. **To Cancel an item** – hover to the left of the item and click 
4. Click Update

Delete a Draft Request

To delete a Request after it has been requested, please refer to the “Cancelling a Dispatch/Request”. This cancel task can be completed by staff who have access to the Dispatch screen.

To delete a Draft Request:

1. Hover on the request and click the blank tick box to the left of the request
2. Click the Delete Draft button which displays

Print a Request

1. Dashboard > Request

2. Hover to the left of the request record and click the tick box
3. Click the Print button which displays and Print as Summary
4. Click the Print button from the Print Preview screen

Reissue

Each item in your catalogue is either tagged that it can be reissued or not. Where it can't, the Reissue button won't be available.

1. Dashboard > Reissue
2. Click the Search button
 - a. Click the Barcode tick-box
 - b. Enter the barcode in the text box under the word "Contains"
 - c. Press the Enter key twice
3. Click the Reissue button
4. Select the Hire Type
5. Click the Client drop down menu to search for and select your patient
6. Click Submit

Edit Assessor Record

You can view all Assessor records but only edit your own Assessor record.

1. Assessors > View Assessors
2. Click the Search button and set up the search for your record
3. Hover to the left of the record, click ... and Edit
4. Edit changes as required and click Update

Client Records

Add New Client

1. Clients > Add a Client
2. Enter Name and Email (if provided)
3. Enter NHI and Client DoB
4. Select Gender and Client Ethnicity
5. Record Client Alert if required (this info will display in Request, Dispatch, Recall and Collection records)
6. Click Add New to record the client's address (the delivery address will default to this address)
7. Click Add New to record the client's phone (the Default Phone Number will default to this)
8. Click Submit

Having the Client's address and phone details is vital for being able to Recall the equipment.

View/Edit Client Record

1. Clients > View Clients
2. Click the Search button and set up the search for the client record, e.g. NHI
3. Hover to the left of the record, click ... and Edit
4. Edit changes as required and click Update
5. To view Client history, click View Equipment History button in the client record

View Client History

1. Clients > View Client History
2. Click the Search button and set up the search for the client record, e.g. NHI
3. Click the Equipment column ▾
4. Choose sort by Descending to group the barcode records

Dispatches

Print a Pick Slip

You can print a pick slip before and after you've assigned items to your dispatch record. If after, it will display the item numbers you have assigned.

1. Hover on the record and click the blank tick box to the left of the request
2. Click the Print button which displays and Print as Summary
3. Click the Print button

Assign Equipment

1. Click [Assign Equipment](#) in your record
2. Click into Select Equipment and scan the equipment barcode or select from the list. You can only scan or choose items In Stock at your warehouse.
3. Click Update

Once all items have a barcode assigned, you can mark the record as dispatched. The Dispatch record will go to Ready to Dispatch status and green text.

Mark as Dispatched - singular

1. After assigning equipment, hover on the record and click the blank tick box to the left of the request
2. Click the [Mark as Dispatched](#) button which will display

Mark as Dispatched - bulk

1. After assigning equipment, click the number under Ready to Dispatch on the Dashboard
2. Click the All Records box and click the [Mark as Dispatched](#) button which will display

Printing Loan Document

1. Dashboard > Current Loans > View Loans
2. Click Search
3. Click Client and enter the NHI or Name in the blank field below "Contains" and click Search
4. Select the Client name and click Print and Print as Summary
5. Click Print

Edit a Dispatch Record

You may be asked to edit a dispatch record for the Therapist if they want to exchange or remove an item or they have forgotten to add an item after they have submitted their Request.

1. Dashboard > Dispatch
2. Click the Assign Equipment button of the Dispatch record

To change an existing item:

3. Select the correct Catalogue Item from the drop-down list

To cancel an existing item:

3. Hover to the left of the item and click the red x
 - a. A message will display saying the initiating Therapist will receive an email advising them an item is being removed from the order
 - b. Click Okay.

To add an additional item:

3. Click Add New. A message will display saying the initiating Therapist will receive an email advising them an item is being added to the order
 - a. Click Okay
 - b. Select the Catalogue Item from the drop-down list
4. Click Update to save the changes.

Cancel Dispatch/Request

This Cancel Request action needs to be treated with a bit of care. This Cancel button not only deletes the Dispatch record but it deletes the whole related Request.

This is what it is designed to do but you need to ensure you have not already dispatched other items within the original Request. For example, you may have a Request with two dispatch records; one Requested and one Stock Demand. If you dispatch the Requested items and then later cancel the Stock Demand items, you will also delete the Request with the dispatched items. In this scenario you would complete the "Cancel Request Item" task.

1. Dashboard > Dispatch
2. Hover on the dispatch line and click the blank tick box to the left of the request
 - a. Complete this action for all dispatch records relating to the Request
3. Click the Cancel button which displays
4. The Dispatch and Request records will be deleted
5. An email will be sent to the initiating Therapist to confirm the cancellation of each item.

Returns

The return items function does the following:

- Reissue/Recall/Loan – Removes any records for that item
- Client History – records the return of an item
- Inventory – subtracts 1 from On Loan and adds it to In Quarantine
- View Equipment – changes the Status of the equipment from On Loan to In Quarantine

In a request, the item won't display in the count as "At Main Location" until it is Moved to an In Stock location.

There are two ways items can be selected for returning:

1. Dashboard > Return
2. Ensure the cursor is in the Scan Items box, scan the barcodes of the item/s then click Return
3. Click the Select All box and click [Return Items](#)
4. Ensure the number of items returned match the physical items being returned
5. Click "Got It" to the confirmation message

Or

1. Dashboard > Return
2. Tick the Items listed in the “Equipment On Loan” section and click [Return Items](#)
3. Ensure the number of items returned match the physical items being returned
4. Click “Got It” to the confirmation message

Move

This is for moving equipment amongst locations at your location.

1. With the cursor placed in the Scan Items field, scan the barcodes of the equipment to be moved to the same location.
2. Click the Move/Transfer button
3. Click the Select All box and click the Move button which displays

If you want to move all the equipment to the same location:

- Select the Location from the **Bulk Destination Location** menu and click **Set All**. This will apply the location entered in the Bulk Destination Location to the New Location fields for all equipment listed

If you want to move multiple equipment to multiple locations:

- Select the Location from the **New Location** field for each equipment item listed
- 4. Click **Submit**

Move Equipment

Current Warehouse: Walkato Warehouse

Bulk Destination Location: Main Store

Set bulk destination location to all equipment: Set All

Annotations:
- Arrow from 'Main Store' dropdown to 'Set All' checkbox: move all the equipment to the same location
- Arrow from 'Main Store' dropdown to 'Main Store' option in the 'New Location' dropdown: move multiple equipment to multiple locations

Current Location	Barcode	Model	New Location
Main Store	940015	CU1	Main Store
Main Store	940032	NM137	Location 2
Main Store	940049	E21	Main Store
Main Store	940065	E21	OT Cupboard
Main Store	940081	E105	Quarantine
Main Store	940097	E158	Main Store

Buttons: Submit, Reset

Transfer

There is the ability to record the transfer of items between hospitals within your DHB. Equipment can only be transferred **to** another hospital; it cannot be taken by another hospital. When you transfer the equipment, it will display in the selected hospital's Quarantine location.

1. Dashboard > Move/Transfer
2. With the cursor placed in the Scan Items field, scan the barcodes of the equipment to be transferred to the same hospital.
3. Click the Move/Transfer button
4. Click the Select All box and click the Transfer button which displays
5. Select the new Warehouse from the drop-down menu and click Submit

Add New Equipment

1. Inventory > Add New Equipment
2. Select the Prefix Code from the menu  where your DHB uses these
3. Scan/Enter the first Barcode Number
4. Select the Catalogue Item from the menu 
5. Enter the Quantity
6. Select a Warehouse Location from the menu  and click Submit

Retire an Item

1. Inventory > View Equipment
2. Click the Search icon
 - a. Tick the barcode box
 - b. Enter the barcode number and press the Enter key twice
3. Tick the box to the left of the record and click [Retire](#)
4. Select a Reason from the menu  and enter a Note
5. Click Submit

Return Retired Item

1. Inventory > View Equipment
2. Click the Search icon
 - a. Tick the Retired box and click Search
3. Hover to the left of the record and click the blue dots and click Edit
4. Remove the tick from the Retired box and click OK
5. Add a Note and click Update

Recalls – Edit (incl. changing Assessor)

1. Dashboard > Recall
2. Use the Search  to locate the specific record
3. Hover to the left of the record, click ... and Edit
4. Change the Request Type if required
5. Change the Assessor if required
6. Change the Date Due Back (to [Extend](#)) for each item if required
7. Add a Contact Successful or Contact Unsuccessful note if required

8. Click Update

Recalls – Request (task to Therapist)

1. Dashboard > Recall
2. Use the Search to locate the specific record
3. Click the Recall button
4. Click any of the 3 Recall Actions to send a task to the Therapist linked to the Recall:
 - a. Extension
 - b. Contact Patient
 - c. STL-LTL (Request Type must be MOH)
5. Record a note to the Therapist and click Submit

Recalls – Action (completed by the Therapist)

1. Dashboard > Request > Click the number under Open Recall Tasks
2. Click the Action button against the client record
3. Select the Recall Action you wish to complete:

Recall Action	Tasks
Extension	To remove any items from being extended, hover to the left of the record, click the X to remove the item Enter Recall Extension Date and add a Note
STL-LTL	Ensure the Hire Request Type = MOH To remove any items from being transferred to LT, hover to the left of the record, click the X to remove the item Enter Eligibility details
Contact Patient	Enter a Note

4. Click Submit

Recalls – Print Recall Letters

1. Dashboard > Recall
2. Use the Search to locate the specific record
3. For one Client, click the client name, Print and Print as Summary and go to step 4
 - a. For multiple clients, click each record , click Print > Print as Summary
 - b. For all records, click the Select All box, click Print and Print as Summary
4. Click Print

Close the STL-LTL Record (Replenishment)

There is a screen which you can use to identify items which have been requested to be transferred to long-term and which items you have received a replenishment item for.

1. From the Inventory screen > View STL to LTL Transfers.
 - a. When a STL-LTL request is completed by the Therapist, a record is created here and displayed in red text.
2. When the replenishment item is received search for the client named on the packing slip
 - a. Click Search

- b. Tick the Client box and enter their name in the text field under “Contains”
 - c. Press the Enter key twice
3. Hover to the left of the record and click the tick box
4. Click the Mark as Completed button which displays

Recalls – Generating an ACC4249

For hospitals who claim from ACC post-6-week issue of STL equipment

1. Dashboard > Recall
2. Click the Search icon
 - a. Search for your patient, or
 - i. Tick Type and enter ACC in the text box under “Contains” and press the Enter key once
 - b. Tick the Next Date Due Back
 - c. Select your date range option from the “Is” menu and click Search
3. Click the blank tick box to the left of the request
4. Click the Process ACC4249 button which displays

From the ACC4249 Reports screen:

1. Hover to the left of the record and click the blue dots and Edit
2. Enter the ACC45 or Claim Number if known
3. Select your Hospital from the menu
4. Enter the Clients Acute Discharge and Hospital six-week equipment expiry date dates
5. Complete the Equipment Details fields
6. Click Update
7. Click the Print ACC Form button
8. Click on the form icon which may display at the bottom of your screen



9. Click the Print icon  and click the  button, or Save as a PDF

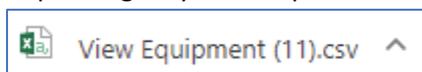
Stock-Take

When you want to do a stock-take you can set a filter on the items to check and export the items listed into a spreadsheet.

To obtain a list for stock-taking, go to the View Equipment screen.

1. Click the Search icon
 - a. Tick the Status box and select In Stock from the menu
 - b. Click outside the menu box
 - c. Using the other headings listed, select your options
 - d. If you have the same items across multiple locations, you may wish to tick the "Warehouse Location" box and enter the location name in the text field under the "Contains" menu.
2. When you have completed your search options, press the Enter key twice.
3. Click the More Options icon, then Export, then Spreadsheet

Depending on your computer set-up, the spreadsheet may display at the bottom left of your screen



If you have found items which are not on your "In Stock" list or are missing items, search for them via the View Equipment screen.

- ✓ If the found item has a Status of "On Loan", complete the Return and Move tasks to record them in your Store
- ✓ If the found item has a Status of "Retired", hover to the left of the record, click the blue dots and Edit
 - a. Untick the "Retired" box and click OK
 - b. Click Update
- ✓ If the found item has a Status of "Transferred to LTL", please return it to your closest Enable NZ Warehouse as this is now a Ministry of Health item
- ✓ If you have identified items missing from your "In Stock" list:
 - a. Tick the box to the left of the record and click Retire
 - b. Tick the "Retired" box
 - c. Change the "Retired Date" to that of the stock-take and select the "Retirement Reason"
 - d. Enter a Note and click Update

Change Password

1. Go to the STL Login screen <https://shorttermloan.enable.co.nz/>
2. Click Forgot Password
3. Enter your email address, image displayed and click Reset Password
4. You will be sent an email as below
5. Click on the [Click here](#) link
6. Complete the Password fields and click Reset Password
7. Continue to sign in using your email and new password.