

Short Term Loan

Detailed User Notes

Contents

Change Password	3
Add a request.....	4
Edit a Draft Request	5
Delete a Draft Request.....	5
Order Status	5
Print a Request.....	6
Dashboard – Dispatch	6
Overview	6
Dispatch Status	7
Search options	7
Print a Pick Slip.....	7
Assign Equipment	7
Mark as Dispatched - singular.....	7
Mark as Dispatched - bulk.....	7
Printing Loan Document	8
Edit a Dispatch Record	8
Cancel Dispatch/Request	9
Add New Equipment	9
Returns.....	10
Move	10
Transfer	11
Recalls	11
Recall Overview.....	11
Recall Request.....	12
Recall Action – (incl. STL-LTL replenishment)	13
Reassign Recall records.....	13
Edit a Recall Record.....	14
Print Recall Letters	14
Merge.....	14
Retire an Item	15
Return Retired Item	15
Reissue	15
Edit Assessor Record	16
Clients.....	16

Add New Client 16

View/Edit Client Record 17

View Client History..... 17

Stock-Take 17

Generating an ACC4249 18

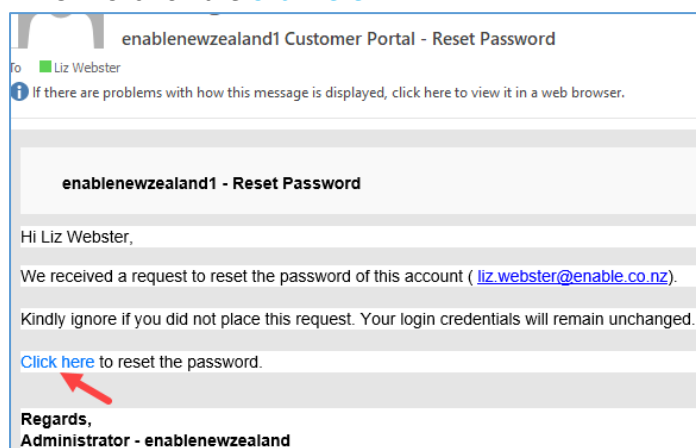
Close off the STL-LTL Record 18

What	When	Who
Addition of topics: Print Pick Slip, Print Loan Document, Print Reminder Letter, Retire and Return Retired Item, Clients, Stocktake	May 2019	Liz Webster
Complete review	July 2019	Liz Webster
Complete review	March 2020	Liz Webster
Revised Move process (implemented Sept 2020)	March 2022	Liz Webster

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

Reset Password

New Password

●●●●●●●●

Confirm Password

●●●●●●●● 👁

Reset Password ➔

7. Continue to sign in using your email and new password.

Add a request

Open Recall Tasks

1 ← Link to Recall related requests, e.g. ST-LT, extension

Draft Requests

big visual of any Draft Requests

→ **2** Link to Request multiple Drafts at once

Click to edit a Draft Request

→ Add a new Request


View Hire Requests Search for a Request 🔍

Click to send Request to Store Click anywhere on the record to display the Request

Request	Request Type	Warehouse	Order Status	Urgency	Assessor	Client	Order Date	Requester
Request	ACC	Nelson Store	Draft	Non Urgent	Liz Webster	Peter McNabb - BTC10027 - 1/11, Tabak Crescent - Takaro, Manawatu-Wanganui - Palmerston North, Palmerston North City	11-Apr-2019	Liz Webster
Request	MOH	Nelson Store	Draft	Non Urgent	Liz Webster	Scott McNabb - BTC10017 - 22, Slacks Road - Awapuni, Manawatu-Wanganui - Palmerston North, Palmerston North City	11-Apr-2019	Liz Webster
Request	MOH	Nelson Store	Requested	Non Urgent	Liz Webster	Jessie McNabb - BTC10032 - 16, University Of Auckland O'Rorke Hall, Mount Street - Auckland Central - Waitemata	10-Apr-2019	Liz Webster
Request	MOH	Nelson Store	Partially Dispatched	Non Urgent	Liz Webster	Emma McNabb - BTC10033 - 10, Pitama Road - Awapuni, Manawatu-Wanganui - Palmerston North, Palmerston North City	10-Apr-2019	Liz Webster
Request	MOH	Nelson Store	Dispatched	Non Urgent	Liz Webster	Myrtle McNabb - BTC1024 - 22, Savage Crescent - West End - Palmerston North	10-Apr-2019	Liz Webster

Minimum requirement to save as a Draft is Client Name and 1 item

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. Request Type
 - a. defaults to MOH but can select others. The Recall date is derived by this Type
 - b. Palliative has a Recall date of 6 months
5. Dates – default to current but can be changed if you wish
6. Assessor – defaults to logged-in user. Click to search for another Assessor name if completing this on behalf of the Therapist. Any Recall tasks will go to the Assessor listed in this request.
7. Urgency – in the Dispatch dashboard, Urgent will display the record in Red and have a count under Urgent
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. Qty at Main Location = your main hospital store
- d. Qty at Offsite Location = other sites linked to your hospital, e.g. Cable Store, Levin, Lakes
- e. Qty Elsewhere = another warehouse at your DHB, e.g. Wairau, Nelson
- f. Ship To – choose from the  to select where you want it sent to
- A separate dispatch record will be created for:
 - Different Ship To options
 - 0 amount at Main Location – (Stock Demand dispatch record)
- 9. Delivery instructions – or to identify if it is already issued. Where this is the case, please enter the barcode number
- 10. Click Save as Draft

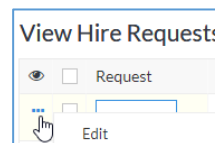
When a request is saved, it is saved as a draft. This enables you to make any edits before submitting it to become a dispatch record.


The request will show in the dashboard in red as a Draft until it is “requested”.

- 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.

Order Status

Status	Description
Draft	Can be edited by the Assessor Request has not yet been sent to Store
Requested	A dispatch record is displayed for Store
Partially Dispatched	Some of the items requested have been dispatched by the Store while there are others on Stock Demand
Dispatched	All items requested have been dispatched

Short Term Loan – Detailed User Notes

Print a Request









Dashboard > Request

Hover to the left of the request record and click the tick box

Click the Print button which displays and Print as Summary

Click the Print button from the Print Preview screen

Dashboard – Dispatch

 Ready to Dispatch 1	 Open Dispatches 6	 Available Stock Demands 0	 Urgent Dispatches 1
 Late Orders 2	 Dispatched Today 5	 Dispatched in Last 7 days 46	 Dispatched 46

View Dispatches

<input type="checkbox"/>	Order #	From Warehouse	Assign Equipment	Print	Status	Assessor	Ship To Text	Ship To	Line Items
	1088	Nelson Store	Assign Equipment	Print	Stock Demand	Andrew Radcliffe	Tom McNabb 42 Bishop Road Squires Gully Nelson Tasman	Client	S4 - Bathboard Plastic 730mm
4	1091	Nelson Store	Assign Equipment	Print	Stock Demand	Andrew Radcliffe	Tom McNabb 42 Bishop Road Squires Gully Nelson Tasman	Client	S4 - Bathboard Plastic 730mm
1	1095	Nelson Store	Assign Equipment	Print	Requested	Liz Webster	Henry McNabb 54 Church Street Awapuni Palmerston North Palmerston North City 4412	Client	B11 - Electric bed Bock Domiflex push n ready B12 - Mattress Mediflex
3	1096	Nelson Store	Assign Equipment	Print	Ready To Dispatch	Liz Webster	Brian McNabb 22 Featherston Street Takaro Palmerston North 4410	Client	B123 - Ramp with day-glow trim
2	1098	Nelson Store	Assign Equipment	Print	Requested	Liz Webster	Liz Webster Ruahine Street Terrace End Manawatu-Wanganui	Assessor	B17 - Overbed Table Tilting Top

Overview

There are two parts to dispatching Short Term Loan equipment; the first being assigning the actual barcodes to the items requested and the second, marking the record as Dispatched. This second part:

- removes the dispatch record from the dispatch list
- changes the original request Status to Dispatched
- creates a Return record so it can be returned
- creates a Recall/Loan record to manage the recall of the equipment
- creates a Reissue record to allow the Therapist to transfer the item from one patient to another
- updates the Client History as dispatched to that Client
- updates the Inventory count and displays in View Equipment as On Loan
- displays a record in Current Loans > View Loans where a loan document can be printed

The records with a Status of Requested have requested items which are available in your store and are ready to dispatch.

The records with a Status of Stock Demand have requested items which are not available.

The Ship To column will advise you where the Therapist would like the equipment delivered to. The Delivery Instructions will provide you further information regarding the request. For example which pick-up time if “Pickup Client” had been chosen as the Ship To option or the barcode number if the item has already been physically issued.

Dispatch Status

1	Requested Assign Equipment – Urgent, waiting to have items assigned, displayed in Red
2	Requested Assign Equipment - waiting to have items assigned, deliver to Assessor
3	Ready to Dispatch – items assigned, ready to dispatch and create loan record
4	Stock Demand – item not currently available in your warehouse
5	Available Stock Demands – when there is a Stock Demand dispatch record and there is now an item available to complete the dispatch

Search options



– Search Options: you can set your search options by any of the headings in the grid, e.g. to display only your dispatch records, search by yourself as the Assessor.

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

Short Term Loan – Detailed User Notes

	<input checked="" type="checkbox"/>	Order #	From Warehou...	Assign Equipment	Print	Status	Assessor	Ship To Text	Ship To	Line Iter
	<input checked="" type="checkbox"/>	1095	Nelson Store	Assign Equipment	Print	Ready To Dispatch	Liz Webster	Henry McNabb 54 Church Street Awapuni Palmerston North Palmerston North City 4412	Client	B11 - El B12 - M
	<input checked="" type="checkbox"/>	1096	Nelson Store	Assign Equipment	Print	Ready To Dispatch	Liz Webster	Brian McNabb 22 Featherston Street Takaro Palmerston North 4410	Client	B123 - F

This action will display a record in the:

- Returns view as Equipment on Loan so they can be returned
- Recall view to enable a Recall Request (extension, STL-LTL, etc.) and where a recall document can be printed
- Reissue view
- Client History as dispatched to that Client
- View Inventory and View Equipment as On Loan
- Current Loans > View Loans (where a loan document can be printed)

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.

These are the checks to complete before cancelling the Request and Dispatch record:

- Check with the Therapist to ensure they want the whole request deleted
- If yes, confirm the items and the date requested




- Check the Dispatch screen to see if all the items requested are displayed
 - If all the items don't display, click the "Dispatched" number
 - Search for the Client
 - If there are dispatch records with the items and the same Requested Date, complete the "Cancel Request Item" task
 - Click the White X to close this screen
- If the Dispatch records do display all the items, they can be cancelled

To cancel the Request and Dispatch record:


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

Add New Equipment

When you get new equipment, you can add it to Inventory. Where there is a Stock Demand dispatch record for the newly created item, a pop-up will display to take you to a screen which will enable you to dispatch the Stock Demand.

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

If there is a Stock Demand record for this item, an Available Stock Demands screen displays:

7. Click [Complete Stock Demand](#)
8. Select the equipment number from the menu  and click Update

The item can then be Marked as Dispatched

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

Items can be moved from one location to another within a warehouse. The most common being moving the item from Quarantine, after cleaning, to an In Stock location where it can be seen as available in a request.

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

Bulk Destination Location

Set bulk destination location to all equipment Set All

Equipment

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

move all the equipment to the same location


move multiple equipment to multiple locations

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

Recalls

 – Search Options: you can set your search options by any of the headings in the grid, e.g. to display by Client, Items Due Back date and/or Assessor.

Recall Overview

Because the request to Recall may come from a Storeperson or an Assessor, there are two actions to complete a Recall:

1. Recall Request
2. Action Recall

Recall Request

Action selected	System action
Contact Patient Successful/Unsuccessful	A Recall note will be added to the Recall record

Extension, STL-LTL or Contact Patient – add Note and Submit	A task will go to the Assessor assigned to the Recall record for them to action. These are displayed in the Request Dashboard – Open Recall Tasks
---	--

Recall Action

Action selected	System action
Extension – Change the Recall Extension Date, add a Note (optional) and Submit	The Recall record’s Item Due Back Date will change to the new date entered and any note will be displayed. The Open Recall Task is removed
STL-LTL – ensure the Request Type = MOH, enter eligibility details and Submit	The Recall record is removed The items are retired with a status of Transferred to LTL. This item cannot be returned to STL using the same barcode. The Equipment History will display it has been transferred to LTL An email will go to Enable NZ with the details to request a LTL replenishment item The Open Recall Task is removed The STL-LTL details can be viewed via Inventory > View STL-LTL Transfers
Contact Patient – add a Note and Submit	A Recall note will be added to the Recall record

Recall Request

If you are not the initiating Therapist but you have approval to extend the Recall date, please refer to the Recall Edits task.

Dashboard > Recall screen you can search for any information using the headings in the screen.

To search for recall records issued by a specific Therapist:

- click Search, tick the Assessor box, enter the Therapist’s name and press the Enter key twice

To search by Recalls becoming due:

- Click Search, tick the Next Date Due Back box, click the “is” menu to choose the timeframe you require and click Search

To record a note:

1. Click the Recall button against the relevant record
2. Click either Contact Patient Successful or Contact Patient Unsuccessful
3. Enter the related note in the Notes field and click Submit.

To request an Extension, STL to LTL replenishment or Contact Patient against the Recall record:

1. Click the Recall button against the relevant record
 - a. For STL to LTL requests, please ensure the Request Type for the patient is MOH.

- b. Only items ticked “Transfer Allowed” are able to be transferred from Short to Long Term
2. Click the relevant radio button and enter a note in the Notes field,
3. Click Submit. This action will send a Recall Request to the initiating Therapist. This will display as a link in the Therapist’s Request dashboard.

Note:

Extension – if there are multiple items listed and you want to extend only some, hover to the left of the item and click **X** to remove the item from the Extension request. It does not remove the item from the Recall record.

STL-LTL – When choosing STL-LTL, only items identified as “Transferred Allowed” will go through on the Recall Request. If the item doesn’t have a blue tick, it means it cannot transfer to LTL.

Recall Action – (incl. STL-LTL replenishment)

1. Dashboard > Request > click the number under “Open Recall Tasks”
2. Click **Action** on the 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

Reassign Recall records


Reassigning Recall records is to enable transferring caseloads from one Therapist to another.

1. Reassigning is completed via the Recall screen.
2. Click the Search icon
 - a. Tick the Assessor box and enter the original Therapist’s name in the text field under the “Contains” drop down menu
 - b. Press the Enter key twice

3. Click the Select All box and click the Edit button
4. From the drop down menu in the text box, select “Assessor”
5. From the Assessor menu, select the name of the Therapist to reassign the record to
6. Click Apply and click Yes to confirm the edit
7. The selected Recall records will now have the new Therapist name displayed


Edit a Recall Record

This may be required to complete a Recall extension if you are not the initiating Therapist, change the Request Type or add a Note.

1. Dashboard > Recall
2. Search and locate the required Recall record
 - a. Click the Search icon
 - b. Tick the Client box
 - c. Enter the patient NHI in the field under the word “Contains”
 - d. Press the Enter key twice
3. Hover to the left of the record, click the blue dots and click Edit.
4. To edit the Request Type
 - a. Select the option from the menu  and click Okay to the warning
5. To extend the Recall date, edit the Date Due Back of the item
6. To add a Recall Note, click Add New in the Recall Notes area
 - a. Select the type of note from the drop down menu
 - b. Record your note
7. Once you have made your changes, click Update

The Next Due Date Back is the earliest date recorded against an item and any notes saved will display in this screen.

Print Recall Letters

1. Dashboard > Recall
2. Click Search . You can choose to search for any recall record using these headings.
 - a. For example, click Next Date Due Back
 - b. Click “Is ▼” and select the timeframe to search, e.g. Current or Next Week
 - c. Click Search
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

Merge

Separate Recall records happen when the Request has a mix of available and Stock Demand items. This type of Request creates two separate Dispatch records and therefore two separate Recall records once they are all dispatched.

Another example may be where the Occupational Therapist has done a request for a patient and a Physiotherapist has completed a separate request for the same patient within a similar timeframe.


Note: Once Merged they cannot be undone.

The Merge option is located in the Recall screen.

1. Click the drop down icon in the Client column and choose “Sort by Asc”. This will list the names together.
2. Check the Client Name, NHI and Type are the same for each record.
3. Check to ensure the Next Dates Due are within a similar timeframe.
4. Tick the records to merge and click the Merge button which will display.
5. Click one of the names from the “Select Loan to Merge Into” drop down menu.
6. Double-check the Name details.
7. Click Submit.

Retire an Item

If you realise the item is no longer fit for purpose or has been lost, it can be retired. Retired items, except for those transferred to LTL, can be restored and added to inventory; e.g. item found.

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



– Search Options: you can set your search options by any of the headings in the grid, e.g. to display by Retired

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

Reissue

Search options



– Search Options: you can set your search options by any of the headings in the grid, e.g. to display by Client or Barcode.

Sometimes, you may deliver an item to a client and they decide they don't want/need it. If you have another client who needs the same item and the item meets hygiene and safety measures, it can be reissued to another client without going through the inwards goods process.

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. Change the Hire Type if required
5. Click the Client drop down menu to search for and select your patient
6. Click Submit

This action will:

- Cancel the existing return record and create a new return record for the new Client
- Cancel the existing Recall record and create a new Recall record for the new Client
- Cancel the existing Reissue record and create a new Reissue record for the new Client
- Client History’s will show reissue to and from clients

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

Clients

As well as adding new clients from within a request, this can also be done separate to a request.

View Clients is where you view their contact details and edit if required. It also provides a link to the client’s equipment history.

View Client History is a direct view of client’s equipment history.



– Search Options: you can set your search options by any of the headings in the grid, e.g. to display by Client or Barcode

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

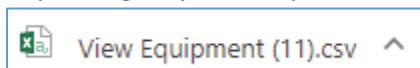
Stock-Take

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

These actions will update the Inventory counts.

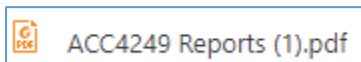
Generating an ACC4249

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 **Print** button, or Save as a PDF

Close off the STL-LTL Record

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

This action will remove the record from the list, indicating you have received the replenishment item.