

**Enable Online with RTL**

**User Notes – Assessors**

# Short Term Loan Equipment

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# Login

**Initial Login to RTL**

You will receive initial Login and password details from Enable New Zealand.

To login for the first time go to the following site   
<https://login.roundtriplogistics.com/>

*RTL Login screen*



1. Enter the code for your Organisation
2. Enter your Username
3. Enter your password
4. Click 

|  |  |
| --- | --- |
| **If…** | **then…** |
| this is the initial log in | Go to step 5 |
| this is a subsequent log in | Go to step 6 |

1. Follow change password instructions
   1. Complete the security question
   2. Open and read RTL terms and conditions
   3. Tick the box to accept RTL terms and conditions
2. Click 

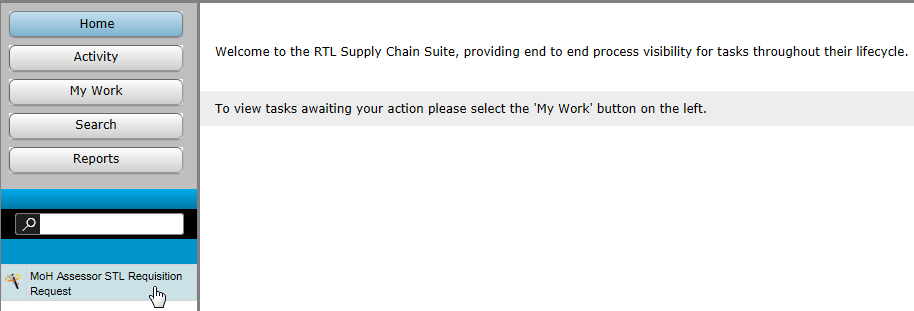
# Key points to note

* **Product selection:**With RTL Short Term Loan there is the ability to request unavailable items on Backorder (Stock Demand) or Hire.

# Creating a Service Request

Once logged into RTL you will progress to the Home screen.

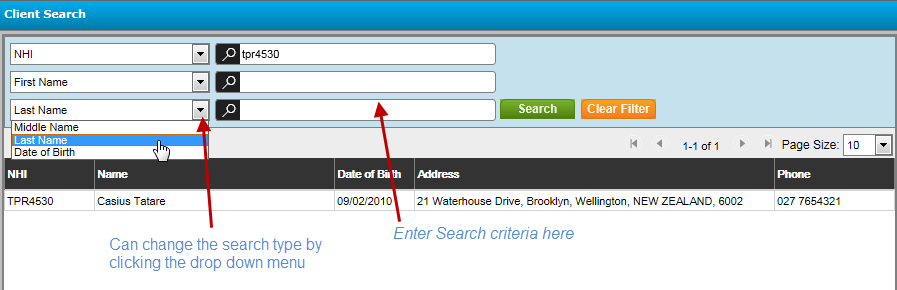
## Home Screen



1. To commence a Service Request click on the **STL Requisition** quicklink (*If the quicklink is not on navigator see page 29)*

Client Search

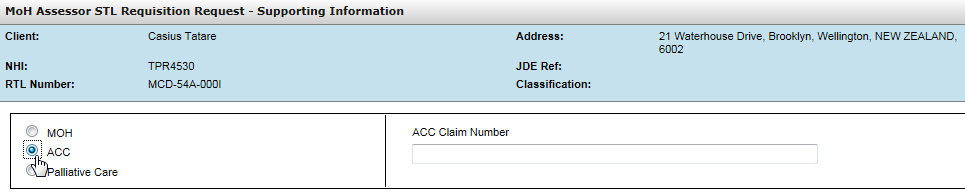
The Client Search screen allows you to establish if the client is new to the RTL system or if they have an existing record.  
*Note: Client searches must be completed for all Service Requests to ensure duplicate records are not created.  
The Search Type can be changed to Last Name or date of Birth by selecting it from the drop down menu DropDownMenu.png*

**

1. Enter the search criteria and click *SearchGreen.png*

|  |  |
| --- | --- |
| **If…** | **then…** |
| Existing client displays, no changes required | Click on the name  Click Continue.png |
| Existing client displays, changes required, | Click on the name  Click EditGreen.png  Update all details as detailed on page 13  Click Continue.png |
| Client not found | Click ,  Click AddNew.png  Complete all the details for the client as detailed on page 11  Click Continue.png |

1. History Summary screen displays only if there are previous STL service requests. To view the details of the Service Request, click the Open Document  icon or click **Continue.png**
2. Supporting Information screen displays.   
   The Type will default to MOH. Click on the radio button to select an alternative Type. *Note: if ACC selected, add the ACC Claim Number if it is available. This will determine the Recall Date for the service request.*



Click Continue.png or 

Inventory Pool Selection screen displays (Only if applicable)   
Complete the fields below:

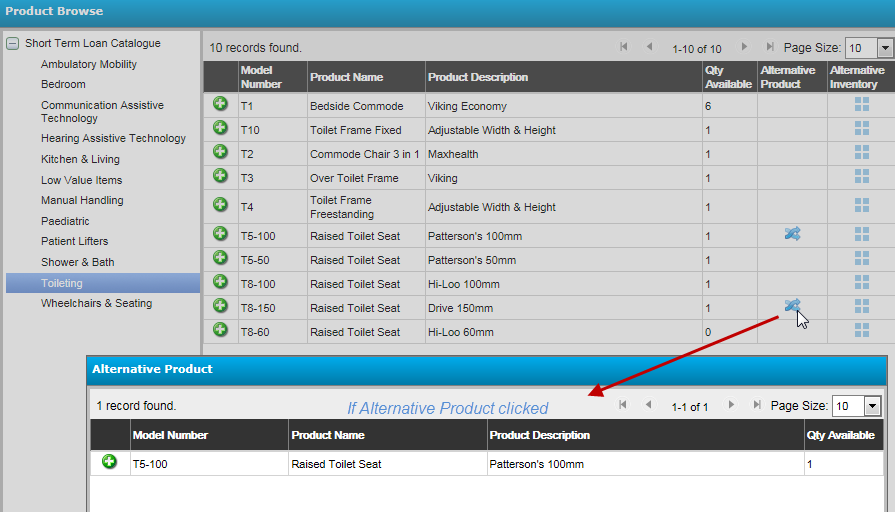
|  |  |
| --- | --- |
| **Field** | **then…** |
| **Warehouse** | Click DropDownMenu.png and select Warehouse |
| **Inventory Pool** | Click DropDownMenu.png and select Inventory Pool |

Click Continue.png or  if unable to complete at this time.

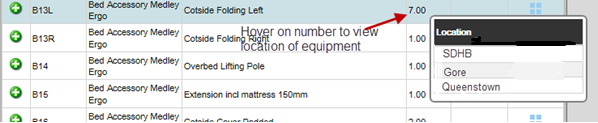
# Product Selection

Product Selection screen displays. *Note: It is strongly recommended to use the Browse rather than the search option as this will display what is / is not available from your Store.*

Product selection screen



1. Click Browse.png
2. Click on **+**next to Short Term Loan Catalogue.
3. Click on the category required to see the list of equipment.
4. Hover on the number in the Quantity Available column to check the location of the equipment (See screen shot below).

Only choose equipment from your local store.   
If equipment is not available locally use the Stock Demand or Hire process.  


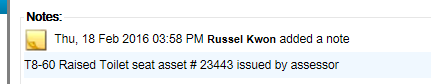
1. Clicking the Alternative Product  button will enable you to select a substitute to the main item.
2. Add Notes against the item if required.
3. Once all products have been selected, click **Continue.png**

**Items Not Available**With RTL Short Term Loan there is the ability to request unavailable items by placing on Backorder (Stock Demand) or Hiring.

|  |  |
| --- | --- |
| **If…** | **then…** |
| **Stock is not available and you wish to put it on Backorder** | Select the unavailable item as above  Change the **Fulfillment Method** DropDownMenu.png to **Stock Demand**  An explanatory note must be entered  Once all products have been selected, click **Continue.png** |
| **Stock is not available and you wish to Hire it** | Select the unavailable item as above  Change the **Fulfillment Method** DropDownMenu.png to **Hire**  An explanatory note must be entered  Once all products have been selected, click **Continue.png** |

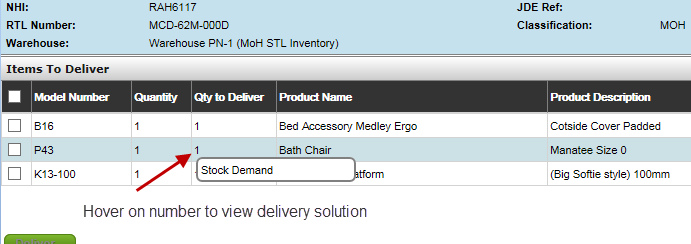
**Assessor issuing from Store or Reissuing between clients**

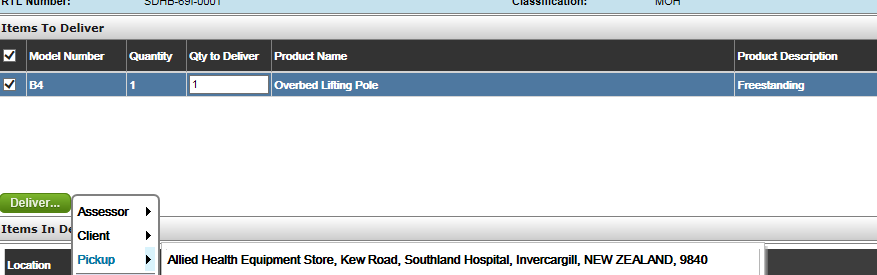
|  |  |
| --- | --- |
| **If…** | **then…** |
| **Stock is being taken from the Store or other after hours locations by the Assessor** | Complete the request in the usual manner and insert a note stating the item description and asset number.  **Do not tick the Assessor Reissue box – this box is only used if transferring equipment between clients.** |
| **Reissuing to another Client \*\*\***  **Assessor Reissue** | Select the item as above  Tick the **Assessor Reissue** box  Enter the **Asset Number** in the Note field (must be done)  Once all products have been selected, click **Continue.png** |

**\*\*\* Please note. Assessors who take equipment from the Store or after hour’s locations must not use the Assessor Reissue process. Complete the request in the normal manner and add the asset number to the notes section of the requisition. This allows stores staff to dispatch the item.  
e.g   
**

Delivery Details screen displays.

Hovering on the Quantity to Deliver field will show which items will be fulfilled, placed on Stock Demand or hired.



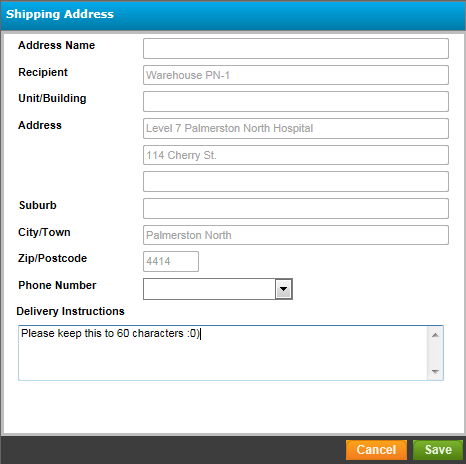
  
Select one of the options below to link an item with a delivery address

|  |  |
| --- | --- |
| **If…** | **then…** |
| The items are Stock Demand or Hire | Select these items from the grid  Click on , StockD/Hire address |
| The equipment is to be split into different delivery addresses | Select the individual items from the grid and follow instructions below for each item |
| The equipment is to be picked up from the Store | Click on , **Pick Up** and then the address |
| All equipment is to go to the client’s delivery address | Select all items from the grid  Click on **, Client** and then the client’s address |
| All equipment is to go to the EMS Assessor | Select all items from the grid  Click on **, Assessor** and then the Assessor’s address |
| All equipment is to go to an address other than the client or Assessor e.g. family etc | Select all items from the grid,  click on **,** **Add new**, complete the required address in the Shipping Address screen |

1. Enter any delivery instructions

Contact telephone number can help with efficient delivery.   
Note there is a maximum of 60 characters available in this field.

1. When address has been chosen or entered, click Save.png



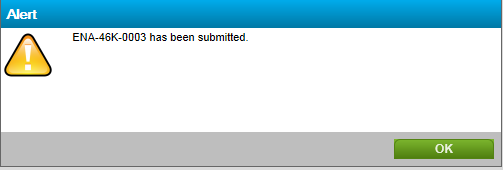
1. Once all items have a related address detail, click Continue.png**.**

Submit Request screen displays. Click 

The PDF of the Service Request will appear. You will be given the opportunity to print or save the PDF.

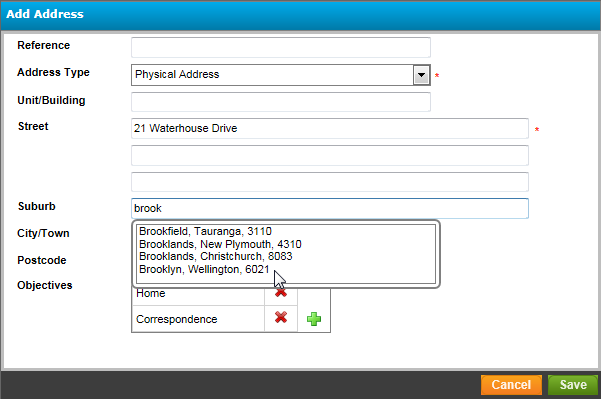
You will receive an alert containing the unique reference number for this Service Request. You may wish to note this number for future reference.

Click  to complete the Service Request



# Create a New Client

*Client Details screen from clicking Add New page 5*

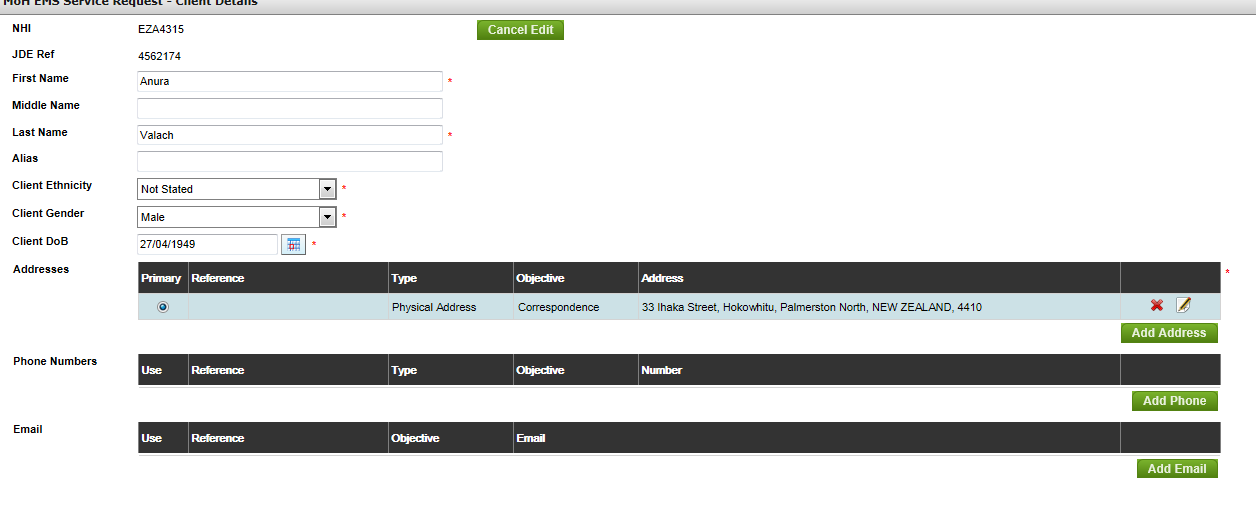
1. From the Client Details screen, click **AddNew.png**
   1. Enter NHI
   2. Enter First and Last Name (Middle name and Alias optional)
   3. Select Client Ethnicity from 
   4. Select Client Gender from 
   5. Enter the Client DoB (format is dd/mm/yyyy)  
        
      
2. Click **AddAddress.png**
   1. Select Address Type from   
      Primary address must be a Physical Address for delivery purposes
   2. Unit/Building field is for Flats, Apartments etc
   3. Enter Street number and name
   4. Enter Suburb  
      When you start to type the suburb name the system suggests options – if the correct suburb appears click on it and the city and post code fields will populate.  
      If there is no suburb in the address and for smaller towns, the town and post code will have to be entered
   5. Enter City and Postcode
   6. When address details are complete click Save.png  
      
3. Click AddPhone.png
   1. Select Phone Type from 
   2. Select Prefix from 
   3. Enter Phone Number (and Extension if applicable)
   4. Click Save.png
4. Click  Or 

# Edit Existing Client Details

*Client Details screen from clicking Edit page 5*

When you have found a client in the Client Search screen and clicked on the client, you will progress to the Client details screen below.

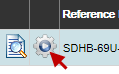
*Client Details screen*



1. Click **** to amend any client details
2. Hover the cursor over the box to the right of the address and the following icons will appear . Click the small picture that looks like a pencil
3. Edit the address and click Save.png
4. Edit the telephone and click Save.png
5. Click   
   This will take you either to the History screen if there are previous service requests or the Supporting Information screen.

# Reclassify Application

If a request needs to be changed from ACC to MOH or vice versa, an assessor can action this.

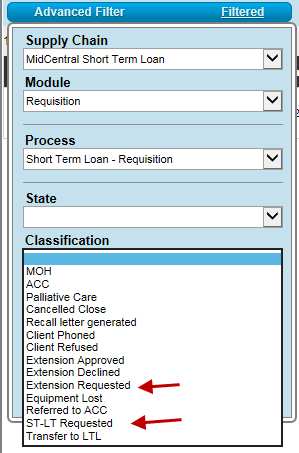
1. Use the  options to locate the application
2. Click  then **Reclassify Application**
3. Select the Type. Enter ACC Claim Number if available
4. Click Save.png

*The Classification and Recall date are updated for the Service Request. The Recall date will apply based on type and from the date the Service Request was created.*

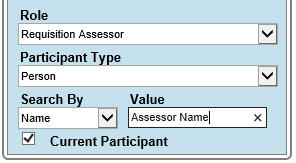
Extension Requests

Assessors must check to see if they have any extension requests or short to long term requests from clients.   
Note – Assessors who have changed location or had requests assigned to another assessor should tick Current Participant so only requests they currently need to review are listed.

1. On the Home page click **Search** then **Advanced Filter**.
2. Pick the advanced filter fields- **Supply Chain, module** and Click on the required classification



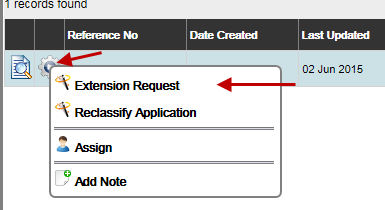
1. Click on **Role** and the logged in assessors name will pre-populate



1. Click SearchGreen.png and all of your requests with the classification added will appear.

To search for other Assessors requests, change the name in the Value field.

When the list of requests presents click on the **Action** Button and then **Extension Request**



The extension Request Screen presents

## 

## Approve extension

To extend the request click the **Extension Approved** button then click in **Extend Recall Date** field and choose the new recall date



Then click the **Authorisation** box and clickSave.png

You will receive a message asking if you wish to proceed click 

## Decline extension

To decline click the **Extension Declined** button, tick the Authorisation box and clickSave.png.

Go to Notes tab and add a reason for declining the request.

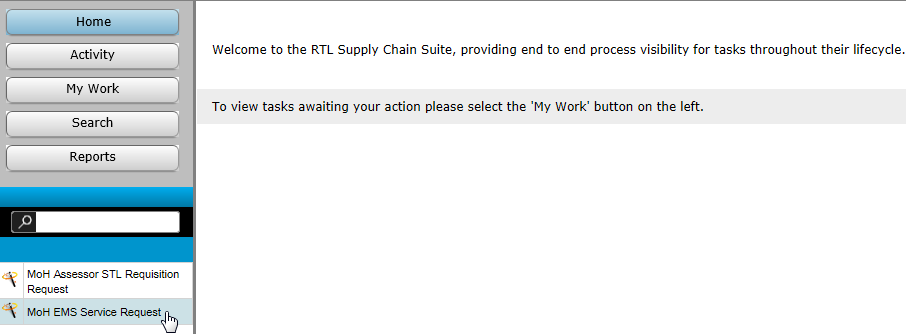
Short to Long Term Loan Transfer – Band 1

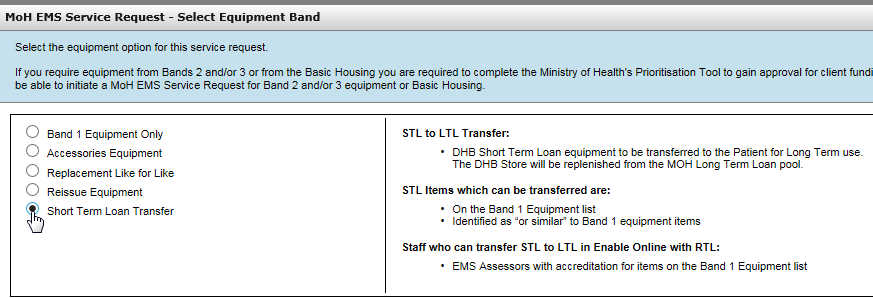
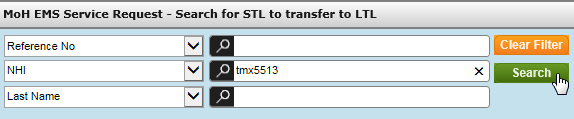
Short Term Loan items may be transferred to Long Term Loan in the following situations:

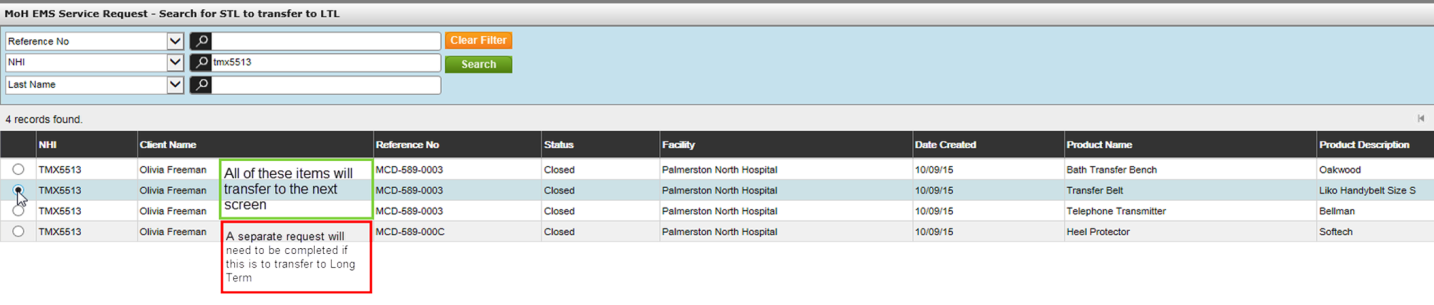
* The patient’s short term loan request must be classed as MOH (not palliative or ACC)
* the patient meets the Ministry of Health long term criteria
* the assessor completing the service request is accredited in the equipment requested
* the equipment has not already been transferred to Long Term
* the equipment is still recorded as being with the patient
* the patient is not recorded as deceased

Only requests for item/s that were dispatched from the Short Term Loan store, will display for transferring to Long Term Loan.

## Home Screen



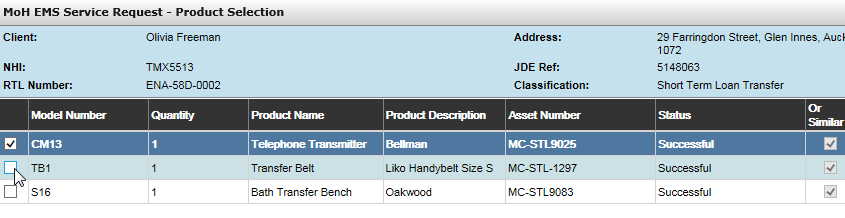
1. To commence a Service Request click on the **MOH EMS Service Request** quick link. If the quick link is not on navigator see page 29.
2. Select Equipment Band - Select the Short Term Loan Transfer option and clickContinue.png  
   
3. Search for STL to transfer to LTL - Enter either the Short Term Loan reference number, NHI or Patient Last Name and click SearchGreen.png  
   

Select any line which contains the item(s) you wish to transfer and click Continue.png  
Note: a transfer is completed per service request. If you have multiple items to transfer on the one service request, all these items will transfer through to the next screen. If the items to transfer are across two or more service requests, a separate short to long term transfer request will need to be completed.  
  


1. Client Details – Clients new to Ministry of Health Supply Chain will automatically advise record is under review. Click Continue.png
2. History Summary – review history details if required and click Continue.png
3. Supporting Information – Notes are not expected for the automated Band 1 process but may be added for assessor reference
4. Enter the **Assessment Date** using the dd/mm/yyyy format or choose the date from the pop-up calendar and click Continue.png
5. Eligibility Details - Complete the details required then click Continue.png
6. Product Selection – tick the items eligible to transfer to Long Term Loan  
   Note: The Status column will identify which items from the Short Term Loan service request will transfer to Long Term Loan

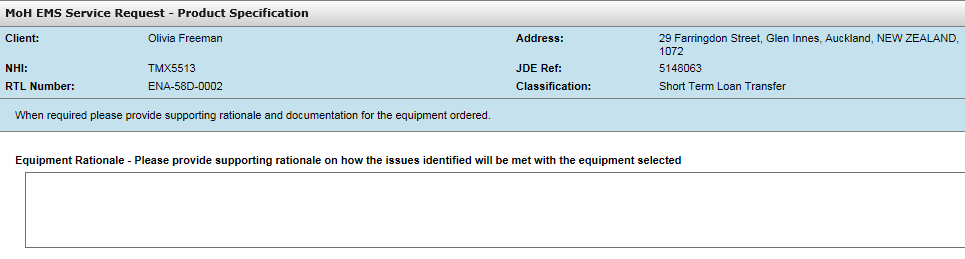
The possible Statuses are:

* + Successful
  + Assessor Not Accredited
  + Item is not a Band 1 item
  + Item already transferred to LTL
  + Item Returned to STL Store

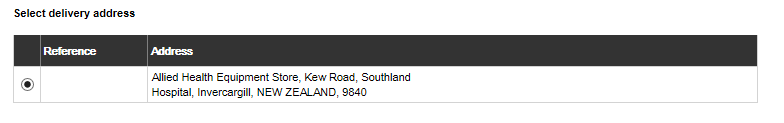


1. Click Continue.png

Product Specification

1. Notes may be added for assessor reference and then click Continue.png  
   ****

Delivery Details – The default delivery address of Short Term Loan Replenishment will display. Click Continue.png



1. Submit Request – Read the EMS Assessor Declaration and Click **EMS Assessor Declaration** **Confirmation** at bottom left of screen  
   ****
2. Click Submit.png

Short to Long Term Loan Transfer – Non-Band One

For non-Band 1 transfers Assessors need to complete a Ministry of Health Equipment and Modification – Prioritisation Tool to ensure that funding is available.

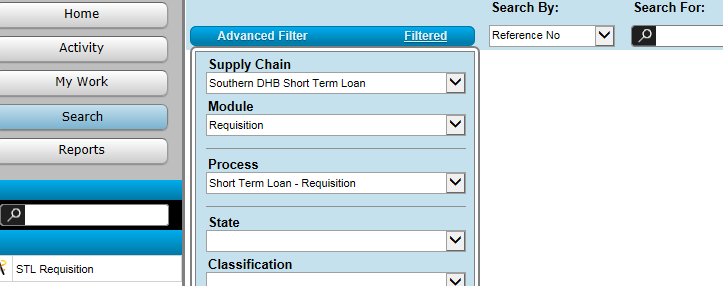
A non-Band 1 Service Request is completed with the following requirements:

1. Assessors must add a note showing the STL Catalogue ID & asset number. The delivery address must be the Short Term Loan Store.

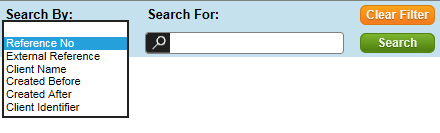
Search Information

The three main reasons to use the search function are to find information about a client - address etc, to find information about a particular requisition or to find requests requiring recall review.

You will have access to any supply chain that your role requires. Filtering the supply chains makes your search more concise.

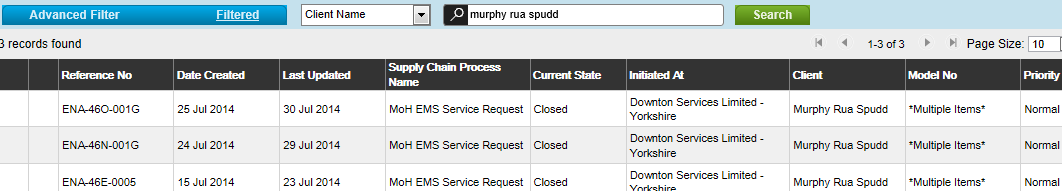


1. Click on **Search** (as above)and choose the supply chain you require. In this instance choose **Southern DHB Short Term Loan**Click on Module DropDownMenu.png
   1. To view Service Requests only – select Requisition
   2. To view Dispatch details only – select Fulfilment
2. You can further refine your search by choosing from the **State** and/or **Classification** drop down lists.
3. Once you have set up your filter choose the criteria from the **Search By** field

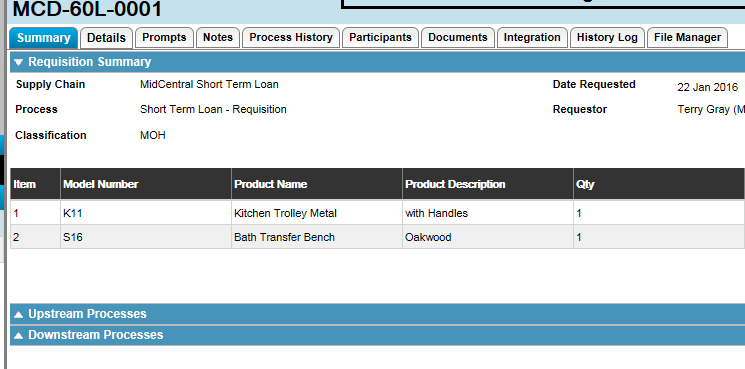


|  |  |
| --- | --- |
| Reference No | A unique identifier allocated to each Service Request e.g ENA-462-0003 |
| External Reference | Not activated |
| Client Name | First and/or last names |
| Created Before | Click in the Search for field and a calendar presents.  You can choose the desired date from the calendar  Or enter the date in the dd/mm/yyyy format |
| Created After | Same as created before |
| Client identifier | NHI number |

1. Enter search criteria in the **Search For** field and click ****



1. Click **View** icon next to the service request you wish to view

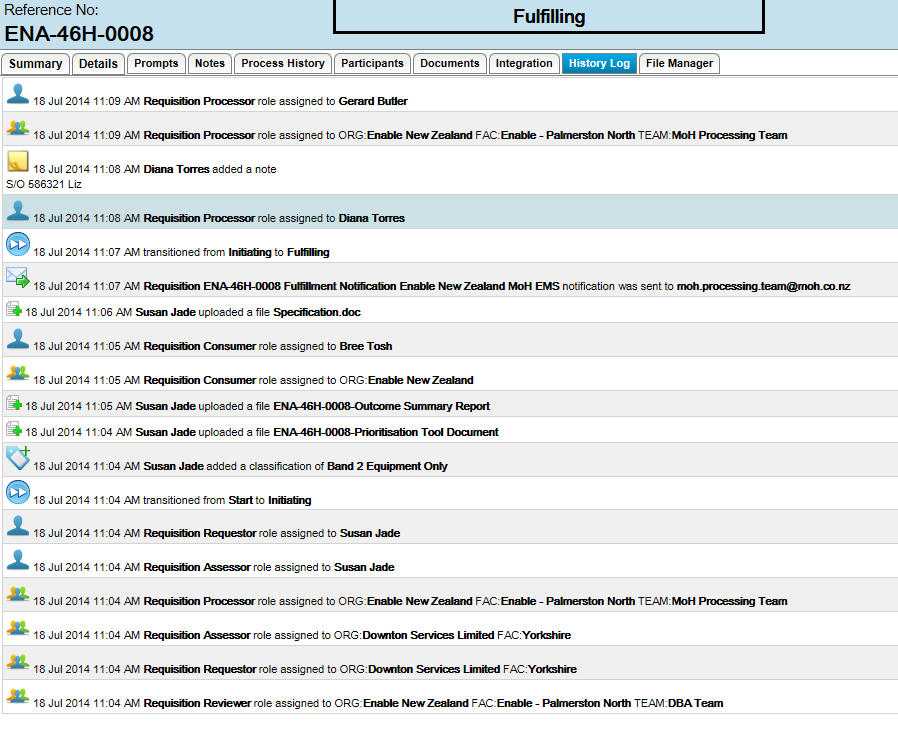


1. The above screen has a series of tabs that contain all of the information about the Service Request. Some of these tabs have further tabs within them.

## Service Request Tabs

|  |  |
| --- | --- |
| **Screen** | **Shows** |
| Summary | Details of the equipment ordered.  Also shows upstream and downstream process number. |
| Details | Details of the requisition.  This screen will also show if Service Request has been cancelled  Further Tabs within screen:  Items – repeats equipment details  Reference transaction – not used at present  Delivery – shows delivery address |
| Prompts | Not activated |
| Notes | Any operational notes added to the Service Request.  This does not include notes added at the item selection stage |
| Process History | Record of various states of the requisition, dates, times and those involved |
| Participants | Record of those who have been involved.  Client Identifiers e.g. NHI  Plus facility to view address details of any of the participants.  To view details click on the hyperlink. This takes you to the person details screen that displays personal, address and phone details |
| Documents | Provides access to PDF of Service Request and the ACC letter and Short Term Loan Reminder letter.  Hover over Equipment and Modification Service Request document and click on the printer icon .  To print click on the print icon in the PDF document |
| Integration | Not activated. |
| History log | Record of interactions with the Service request see e.g. P22  Note- item notes do not appear |
| File manager | Not Used. |

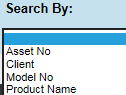
### History Log

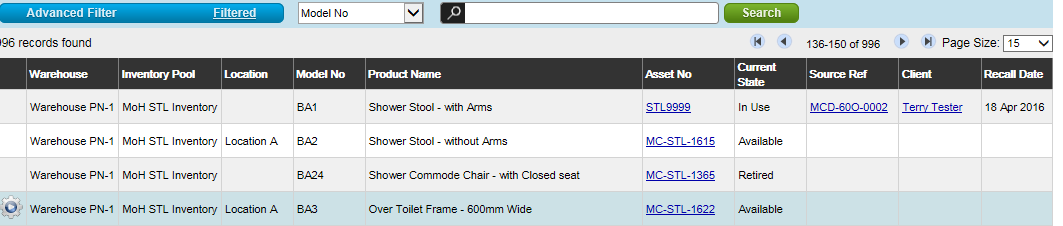


# Asset Management Tab

The Asset Management Tab provides a view of all assets active in the Short Term Loan System.

To view the Asset Management Screen:

1. On the Home page click  and then the Inventory Management button 
2. Click on    
     
   The Asset management view presents showing the store inventory in model number order
3. The search may be filtered to search by 



The current state of assets can be:

* In Use. All assets in this state will have a client associated with them
* Retired
* Available. Note -assets that are in maintenance or undergoing repairs will show as available.

There are three hyperlinks in the screen.

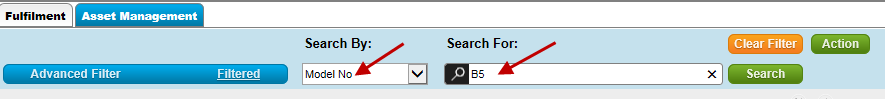
* Click on the Asset No hyperlink to view the history of the asset
* Click on the Source Ref hyperlink to view the original request information
* Click on the Client hyperlink to view client details – name, NHI no, address etc

## To establish if any items at a state of Available are in maintenance or repair locations

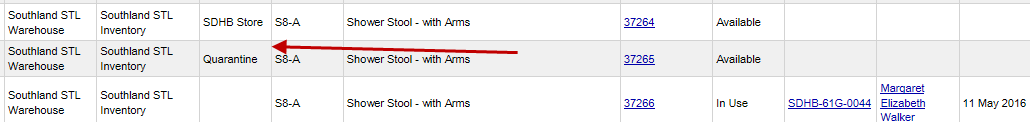
Items that are in the maintenance or repair locations appear as available in the Asset Management screen.

To check if assets are in these locations:

1. On the Home page click  and then the Inventory Management button 
2. Click on 
3. Choose model number in Search By field and enter Model Number in the Search For field and click 



Asset locations can be viewed in the screen.



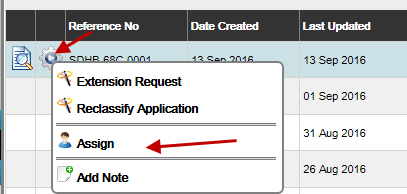


Do not choose equipment that is not in your local store location.

Stock in Quarantine or Repairs locations may not be immediately available.

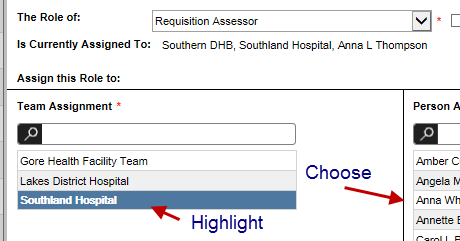
# Reassign Requisitions

Requisitions may be assigned to another Assessor if they are at Fulfilling or Closed state.

1. Find the requisition that you wish to assign to yourself or another Assessor  
   
2. Click on the **Action** button and then **Assign**



1. When the screen above presents remove the tick and choose **Requisition Assessor** from Drop Down list



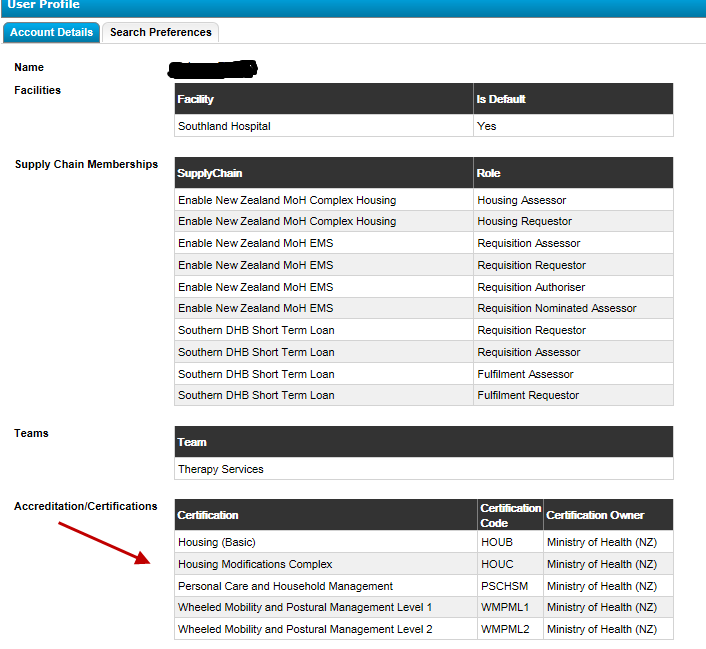
1. When the screen above presents highlight the location, choose the Assessor to assign the requisition to and click Save.png

Check your details in RTL?

You can check in Enable Online with RTL to see facility and accreditation details against your logon. Your User name will now display in blue underline.



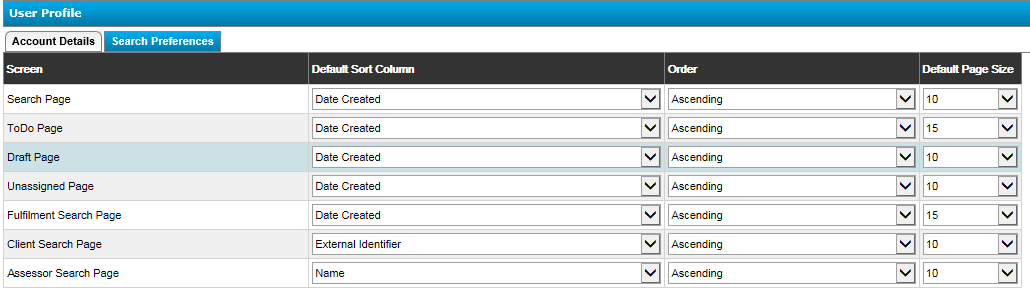
To access this information you must be on the Home page. Click on your user name and the following information will display:



Change the order of information displayed

You are able to change the display order that pages in RTL present application information.

From the Home page, click your User Name and click Search Preferences



The first column displays the Screen the search will apply to. Any column/row with a drop down arrow can be changed. For example, if you wish to see the oldest applications first, change the Order to *Ascending*, or if you wish to see 25 transactions per page, change the Default Page Size to *25*.

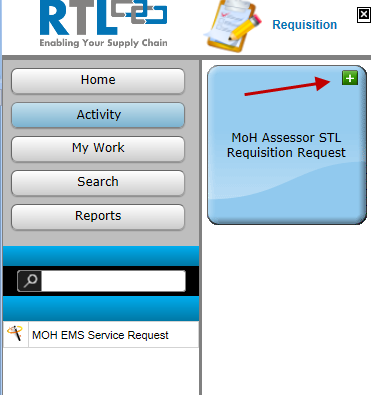
If you make any changes, you will need to click **Save Changes** to action the change. Columns you can change are:

* Different default sort columns
* Order
* Default page size

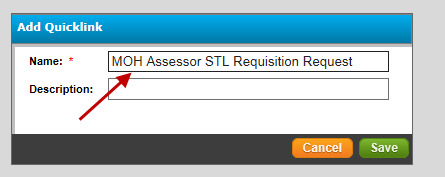
# Adding quicklink to RTL requisitions

If the **MoH EMS Service Request** shortcut is not displayed when you log into your Organisation, follow the steps below to add:

1. Click **Activity**
2. Click **Requisition**
3. Click  on MOH EMS Service Request



1. Type **MoH Assessor STL Requisition Request** in the **Name** field  
   Note: **Description** field is optional



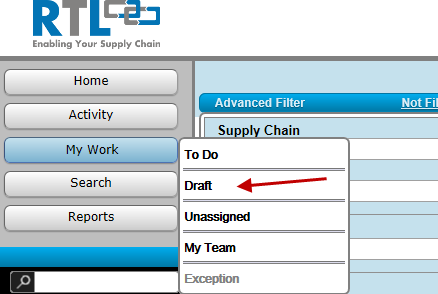
1. Click **Save.** The Shortcut will appear  
     
   

# Requests in Draft

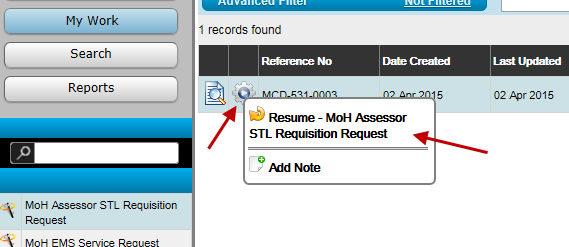
Assessors can save partially completed requests to their draft folder and retrieve them for completion at a later time.

Requests will be automatically saved to drafts if the system times out during completion.

1. On the Home Page click on My Work then Draft



1. When Draft screen presents click on the Action Menu button and then Resume –MOH Assessor STL Requisition



The last completed screen will then present and the request can be completed.

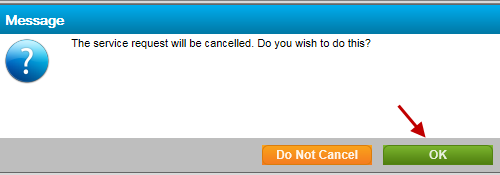
# Deleting Unwanted Drafts

Assessors should delete drafts that will not be completed from their Draft folder.

1. Go to Draft folder and resume the request as done in steps 1 and 2 from the previous page
2. When the last completed screen presents Click on Cancel at the bottom of the screen



1. You will receive the following warning message - Click OK

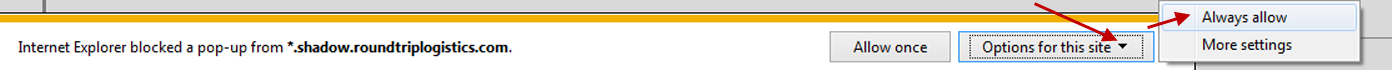


# PDF’s not automatically presenting after submitting request.

Sometimes the PDF’s do not present because of your local computer settings and needs to be corrected by your IT team.

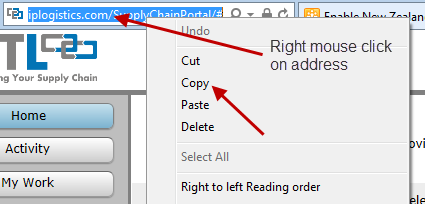
However you can try the following:

When the alert below appears after submitting the request click on the drop down arrow next to “Options for this site” and then on “Always allow.” The PDF should then appear.

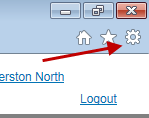


To check if your system is blocking the PDF from popping up.

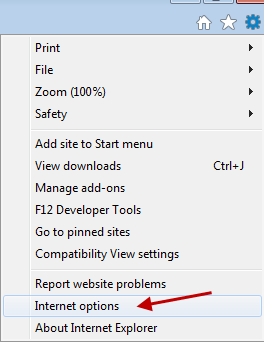
1. From the Home Page of RTL copy the RTL address by right clicking in the address field then click “copy” when it appears.



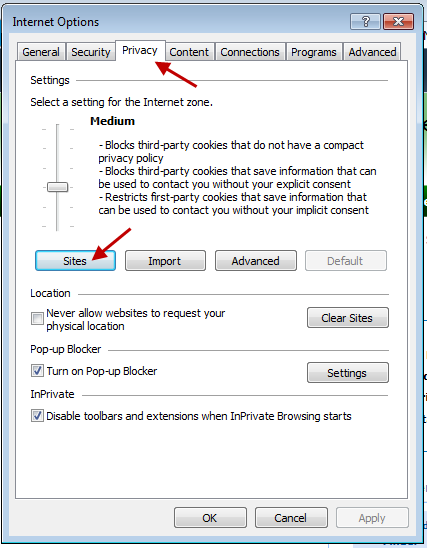
1. Click on the cog like icon at the top right of the Home Page.



1. When the drop down menu below appears click Internet options.

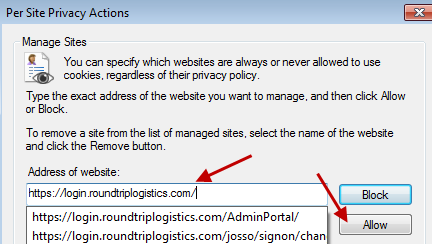


1. Click the Privacy tab and then the Sites tab.



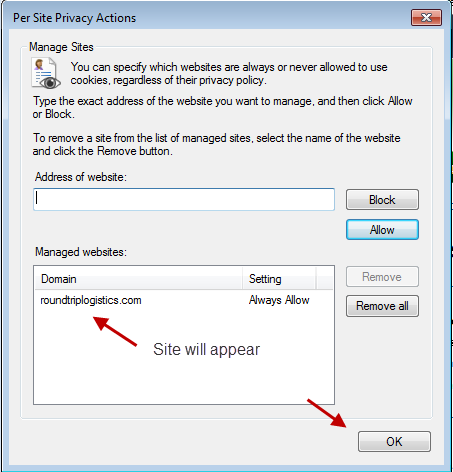
1. Right click in the Address of website field and paste the RTL site address that you copied at step 1.

Then click the Allow tab.



1. The RTL site name will appear in the Managed websites field.

Click OK to finish.



Where to go for help?

For general assistance and queries, contact Enable New Zealand:

|  |  |
| --- | --- |
| Telephone: | 0800 362 253 |
| Email address: | [enable@enable.co.nz](mailto:enable@enable.co.nz) |

**Forgotten password or user name**

If you have forgotten your password or user name, follow the steps below:



|  |  |
| --- | --- |
| **If...** | **Then...** |
| Forgotten password | * Click **­Forgotten password** – you will be asked to enter your User Name and Email Address. * Click  - a password reset link will be sent to your email. |
| Forgotten username | * Click **­Forgotten Username** – you will be asked to enter your Email Address. * Click  - a list of usernames will be emailed to you. |

**Useful links and websites:**

|  |  |
| --- | --- |
| Enable Online with RTL | <https://login.roundtriplogistics.com/> |