

CE for Immediate Purchase – Help Request Screen

WE are pleased to announce a new enhancement that will aid in the streamlining, tracking and execution of the *Credit Exception for Immediate Purchase*. Currently the system relies on one off emails to RAD's and their ability to stop (Assuming they are available), review the reason in the email, open the WO and check the CE button only they can see. There is also no tracking of the approvals and denials either. To remedy these issues, we have now moved this function to the "Help Request" tool on the main screen of MA.

The screenshot shows the MA system interface with various tabs at the top: Detail, Reports, Summary, Notes, PO, Collections, Payer 1, Payer 2, Payer 3, Delivery, Scan Docs, Activity, and Perf. The main content area is divided into several sections:

- ACTIVITY DATES:** Includes fields for Referral, Initial Contact, Evaluation (04/11/2024), and Detail Update (04/11/2024).
- PURCHASE ORDER:** Includes a table for Generated, Issued, Cancelled, and Received counts (all 0), and fields for First Issue Date, All PO Rcv'd Date, Delivery Verified By, Delivery Person, Delivered Date, Dlvry Requirements, Ref/Del RTS, Key Acct Mgr, AR Balance (\$5,093.55), and Pay Notes (Current NPI: 1053384990).
- Documents Completed:** Includes fields for Submission, Pre-Dlvry, and Delivery (04/11/2024).
- Funding Pkg Submitted:** Includes a field for Funding Approved.
- Credit Ex Purch at Sub:** Includes a checkbox for Credit Ex Delivery.
- Notes:** Includes a text area for notes.
- Status Email Recipients:** Includes a text area for recipients and checkboxes for Client Rights & Resp, Parts Only Order, and LMN iPad.

At the bottom of the form, there are buttons for "Update Work Order", "Request Help" (highlighted with a red box and a red arrow), and "Triage Form".

1. Click the Help Request Button on the Main screen of MA.
2. Select the Purchase Immediately button.
3. Enter justification reasoning.
4. Click Submit.

The screenshot shows the "Work Order Change Request Form" with the following sections:

- Remove Date From:** Includes radio buttons for ChairBuilder Complete, Evaluation Date, Quote Conf. Complete, Initial Contact, Evaluation Reset, Funding Submit, Credit Exception - Purchase at Submission, Credit Exception - Delivery, and Credit Exception - Purchase Immediately.
- Request Credit Exceptions:** Includes a radio button for Purchase Immediately, which is selected and highlighted with a red box and a red arrow.
- Justification / Request Details:** Includes a large text area with the instruction "Enter Justification reasoning here" highlighted with a green box.
- Buttons:** Includes buttons for Submit (highlighted with a red box), Reset, and Cancel.

This will then send the CE request for Immediate Purchase to the WO Change Request Tool managed by the RADs and Funding Managers/Directors.

| Date | Branch | WO | Req'd By | Type | New Value | Justification / Details |
|-----------|--------|-------------|----------|------------------------------------|-----------|--|
| 6/21/2024 | 8 | 008-3673398 | Geiss | Credit Exc to Purchase Immediately | Add Date | Client turning 21 on 8.15.24. Need to expedite parts before client ages out of CCS system. |

RADs or appropriate director will then review the request, select the appropriate approval or denial action, enter a response if warranted and submit the approval or denial. An email will be sent to the requestor as with all other Help Request approvals/denials.

| | | | | | | |
|---|---|------------------------------------|----------------------------|--|--|--|
| Action taken: | <input type="button" value="Approved"/> <input type="button" value="Approved"/> <input type="button" value="Denied"/> | Reason for Action: | CE request approved by RCG | | | <input type="button" value="Submit"/> |
| 6/21/2024 | Geiss | Credit Exc to Purchase Immediately | Add Date | Client turning 21 on 8.15.24. Need to expedite parts before client ages out of CCS system. | | <input type="button" value="View WO"/> |
| Document Name | | Scanned By | Scan Date | | | |
| • Eligibility_P1_4/11/2024 4:54:21 PM_C | | Agsaulio | 4/11/2024 | | | |
| • Rx-DWO | | Agsaulio | 4/11/2024 | | | |
| • Snapshot_CBC_1 | | Dettmann | 4/11/2024 | | | |

If approved, The CE to Purchase Immediately box will appear on the main screen of the WO with the reason originally submitted with the request.

| | | | | |
|---|--------------------------|------------|---|--|
| Documents Completed | | | Ref/Del RTS | <input type="button" value="v"/> |
| Submission | Pre-Dlvry | Delivery | Key Acct Mgr | <input type="button" value="v"/> |
| <input type="text"/> | <input type="text"/> | 04/11/2024 | AR Balance | \$5,093.55 |
| Funding Pkg Submitted | <input type="text"/> | | Pay Notes | Current NPI: 1053384990 |
| Funding Approved | <input type="text"/> | | <input type="text"/> | |
| Credit Ex Purch at Sub | Credit Ex Delivery | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | |
| <input checked="" type="checkbox"/> CE to Purchase Immediately Reason for Immediate Credit Exception: Client turning 21 on 8.15.24. Need to expedite parts before client ages out of CCS system. | | | WO Reference | <input type="text"/> |
| Notes | | | Status Email Recipients | (Do not use client email address here) |
| <input type="text"/> | | | Separate addresses with semi-colon | |
| | | | <input type="checkbox"/> Client Rights & Resp | <input type="text"/> |
| | | | <input type="checkbox"/> Parts Only Order | <input type="checkbox"/> LMN iPad |
| | | | <input type="button" value="Request Help"/> | |
| | | | <input type="button" value="Triage Form"/> | |
| <input type="button" value="Update Work Order"/> | | | | |

A complete transaction log on the request and decision for approval/denial will automatically populate to the notes as well in the WO.

| | | | | | |
|---|--------------------------------------|--|--------------------------------------|---|--|
| <input type="button" value="New Note"/> | <input type="button" value="Print"/> | <input type="button" value="Fax Log"/> | <input type="button" value="Email"/> | <input type="button" value="Reminder"/> | View: <input checked="" type="radio"/> Date <input type="radio"/> Category |
| <input type="radio"/> | 6.21.24 2:53 P | Robert Geiss, Documentation - Help Request - Credit Exc to Purchase Immediately - Approved - CE request approved by RCG | | | |
| <input type="radio"/> | 6.21.24 2:47 P | Robert Geiss, Documentation - Help Request - Credit Exc to Purchase Immediately - Client turning 21 on 8.15.24. Need to expedite parts before client ages out of CCS system. | | | |
| <input type="radio"/> | 4.15.24 10:17 A | Shandy Swafford, Documentation - Once ATP responds, Send Chairs Make/Model along with Rear Wheel Size/Seat Width | | | |

This will also allow for the history of the actions taken to be logged and tracked in the WO Change Request Toll as with any other Help Request function currently. (This is an administrative function only available to those with access to the WO Chage Request Tool)

Sort By View 8 Credit Exc to Purchase Immediately 01/01/2024 06/21/2024

ratest/admin/WOChangeRequests/HistoryReport/default.cfm - Google Chrome

Not secure ratest/admin/WOChangeRequests/HistoryReport/default.cfm

| Date | Branch | WO | Type | Type Detail | Req'd By | Justification / Details | Action | By | On | Reason |
|-----------|--------|-------------|------------------------------------|-------------|----------|--|----------|--------------|-----------|----------------------------|
| 6/6/2024 | 8 | 008-3677682 | Credit Exc to Purchase Immediately | | Boonstra | dfasfdsaf | Approved | Tim Boonstra | 6/6/2024 | dfdasf |
| 6/6/2024 | 8 | 008-3677682 | Credit Exc to Purchase Immediately | | Boonstra | test pi | Approved | Robert Geiss | 6/21/2024 | |
| 6/7/2024 | 8 | 008-3561908 | Credit Exc to Purchase Immediately | | Geiss | Test Imediate CE | Approved | Robert Geiss | 6/7/2024 | Approved |
| 6/7/2024 | 8 | 008-3591053 | Credit Exc to Purchase Immediately | | Geiss | Test CE Immediately | Approved | Robert Geiss | 6/7/2024 | |
| 6/21/2024 | 8 | 008-3673398 | Credit Exc to Purchase Immediately | | Geiss | Client turning 21 on 8.15.24. Need to expedite parts before client ages out of CCS system. | Approved | Robert Geiss | 6/21/2024 | CE request approved by RCG |

Removal of CE for Immediate Purchase – Help Request Screen

We have also added the function to remove the CE for Immedate purchase to the help request as well. Currently the only CE date that could be removed was the CE for Purchase at Submission. We felt it prudent that we had the functionality to do both. This works just like all the other dates one could always be request to be removed and flow through the WO Change Request too for RADs and Funding Managers/Directors to approve.

*** As a general rule, if all the PO's have been issued and/or received you do not want to be removing the CE for purchase date unless you intend to cancel the PO's that have not shipped or return the ones that have been received. At this time, we have not put any blocks or stops in that prevent the CE dates from being removed after the fact but common sense would dictate that once the purchasing action has been executed as requested there is no point in taking the dates out unless we plan to cancel everything.

Work Order Change Request Form

Remove Date From:

ChairBuilder Complete

Evaluation Date

Quote Conf. Complete

Initial Contact

Evaluation Reset

Funding Submit

Credit Exception - Purchase at Submission

Credit Exception - Delivery

Credit Exception - Purchase Immediately

Request Credit Exceptions:

Purchase Immediately

Justification / Request Details