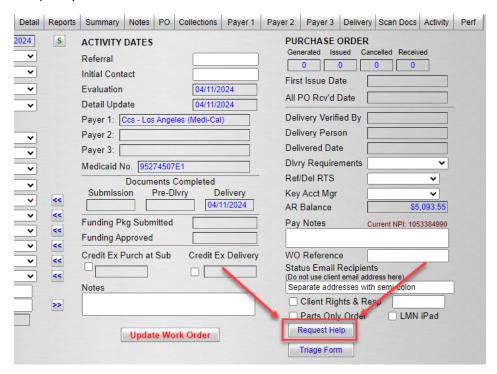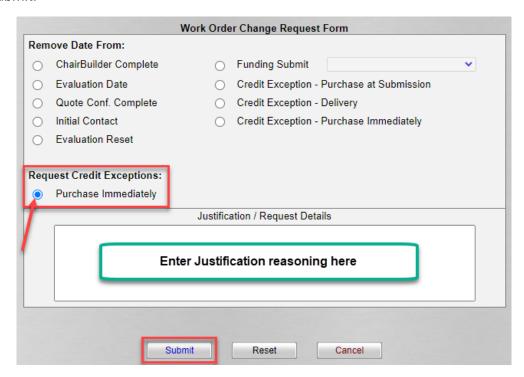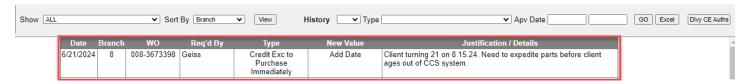# CE for Immediate Purchase – Help Request Screen

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.

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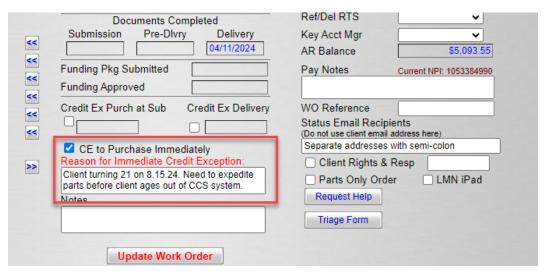3. Enter justification reasoning.
4. Click Submit.

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

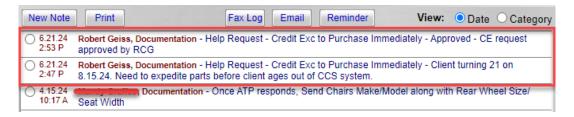| Date	Branch	WO	Req'd By	Type	New Value	Justification / Details
Show ALL ▾	Sort By Branch ▾	View	History ▾ Type ▾	Apv Date	GO Excel Dlvy CE Auths	
6/21/2024	8	008-3673398	Geiss	Credit Exc to Purchase Immediately	Add Date	Client turning 21 on 8.15.24. Need to expedite parts before client ages out of 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.
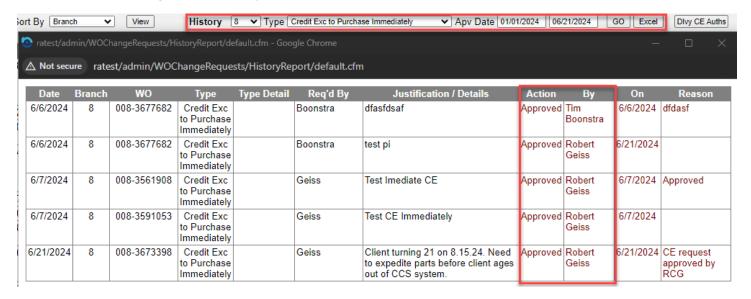
Action taken: Approved ▾	Reason for Action:	CE request approved by RCG	Submit
Approved			
Denied			

| 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. | 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
Submission   Pre-Dlvry   Delivery
04/11/2024
Funding Pkg Submitted
Funding Approved
Credit Ex Purch at Sub   Credit Ex Delivery

☑ 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.
Notes

Update Work Order

Ref/Del RTS ▾
Key Acct Mgr ▾
AR Balance $5,093.55
Pay Notes   Current NPI: 1053384990

WO Reference
Status Email Recipients
(Do not use client email address here)
Separate addresses with semi-colon
☐ Client Rights & Resp
☐ Parts Only Order   ☐ LMN iPad
Request Help
Triage Form

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

New Note	Print		Fax Log	Email	Reminder	View: ● Date ○ Category

○ 6.21.24 2:53 P Robert Geiss, Documentation - Help Request - Credit Exc to Purchase Immediately - Approved - CE request approved by RCG
○ 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.
○ 4.15.24 10:17 A ▓▓▓▓▓ 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)

Removal of CE for Immediate Purchase – Help Request Screen

We have also added the function to remove the CE for Immediate 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.