

Sefton Stores – Referrer's guide to placing a special orders onto elms. Special order equipment – non-catalogue items.

Funding for specialist (non-core stock) equipment is not guaranteed as there is a great deal of pressure on the equipment budget. It is therefore essential that you provide as much information as you can. If insufficient information is supplied the panel will not be able to decide and this may result in a delay for your client.

All special orders are reviewed by special panel members. As soon as a decision has been made our finance team will inform the referrer of the outcome of their special order.

If your special order is **urgent**, please let us know on your special-order form.

Quotations & recycled stock Information: -

If you need help to find out if we have any recycled stock or help to find a supplier who manufactures your requested equipment. Please contact our finance team on 0151 288 6210 or 07811 712 993

Recycled Stock

If there is an item available in recycled stock, please take a note of the elms item code for the item of equipment.

Quotations

Once you have clinically assessed that your client needs a specialist piece of equipment, that isn't available in recycled stock, you will need to provide up to 3 official quotations. (We are not able to accept internet pages as quotations).

If your special order is for a bespoke piece of equipment or you have completed a joint visit with a rep from a company, then please ask the rep to provide you with a quotation for your order. If only one company sell this type of equipment, then we will be happy to accept 1 quotation. Please make this clear in your request.

The onus is on the referrer to check the quotations for any errors and make sure that the company has quoted for the correct equipment. Our finance team will only order what is quoted for.

IMPORTANT save an electronic version (scanned or as sent as an attachment) of your quotations for your special order on your PC ready to attach to your order.

Adult Or Child's Special- Order Process.

Log into the system. – Click **Continue**

Example, Referrer Elms2

Confirm Your Details - [SEFTON] South Sefton Store (SEFTON) (S)

Please confirm that the following details are correct. If the details are wrong, please correct them below, and select Update

Title

Forename

Surname

Email

Mobile

Landline

Show Other Contact Numbers ▼

[Update](#) [Continue](#) [Change Password](#) [Change Role](#)

Check your information and click **'Continue'**.

Example, Referrer Elms2

Session Setup - [SEFTON] South Sefton Store (SEFTON) (S)

Please select the settings you wish to use for this session

Store

Referrer

Base

Budget Holder

Category

☐ Remember these settings

[Continue](#)

Search for your client. Click **'Clients & Orders'**

Example, Referrer Elms2

Welcome To South Sefton Store (SEFTON) (S - [SEFTON] South Sefton Store (SEFTON) (S)

Welcome to the Sefton Community Equipment Service ELMS ordering system.

The annual Elms system upgrade will be on Thursday 6th July 2023 between 9am and 12pm.

Continue

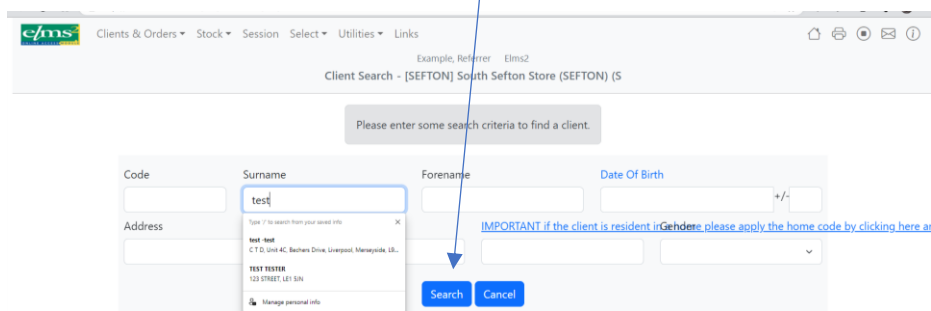
Click 'Client Search'



The screenshot shows the top navigation bar of the ELMS system. The 'Client Search' link is highlighted with a blue box and an arrow pointing to it. The header also includes the ELMS logo, navigation tabs (Clients & Orders, Stock, Session, Select, Utilities, Links), user information (Example, Referrer, Elms2), and a welcome message for the South Sefton Store (SEFTON).

Welcome to the Sefton Community Equipment Service ELMS ordering system.

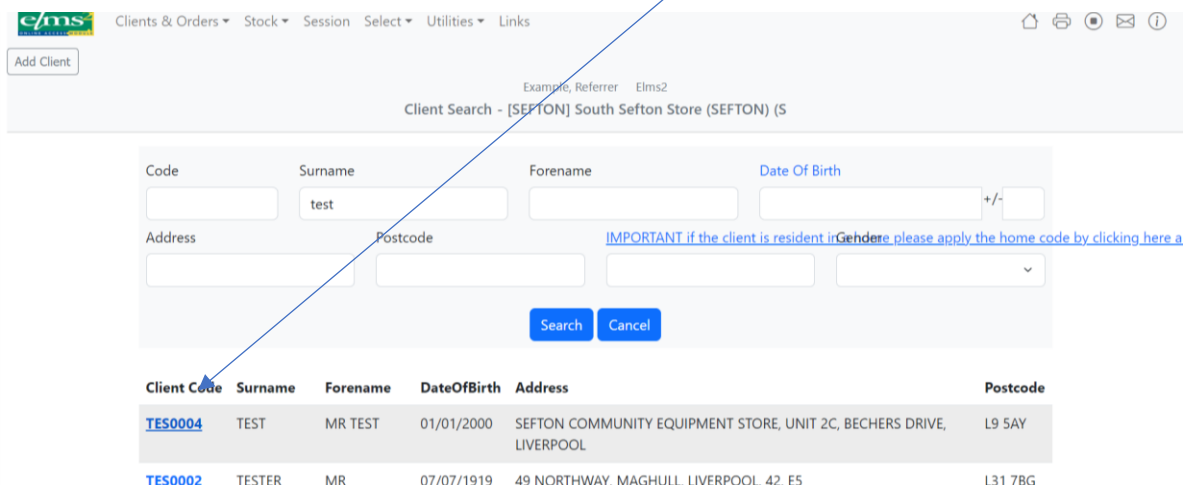
Enter client's details. Click 'Search'



The screenshot shows the 'Client Search' form. A dropdown menu is open under the 'Surname' field, showing search results for 'test'. The results include 'test - test' and 'TEST TESTER'. A blue arrow points to the 'Search' button. A note at the bottom of the dropdown states: 'IMPORTANT if the client is resident in Sefton please apply the home code by clicking here ar'.

Select your client from the list below. Click 'Client code' to open their record.

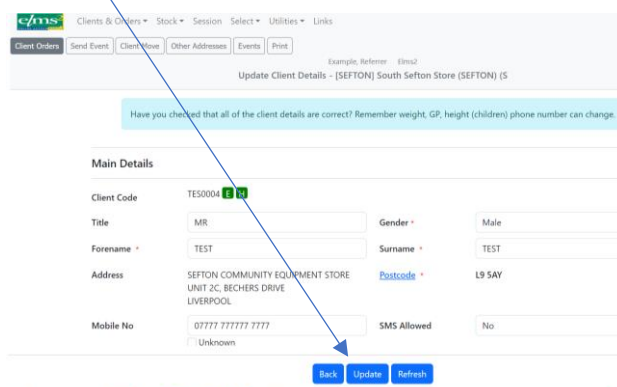
Or add a new client. (If unsure see 'How to Add New Client').



The screenshot shows the 'Client Search' results page. It includes a table with client details. The first client is 'TES0004' with surname 'TEST', forename 'MR TEST', date of birth '01/01/2000', address 'SEFTON COMMUNITY EQUIPMENT STORE, UNIT 2C, BECHERS DRIVE, LIVERPOOL', and postcode 'L9 5AY'. The second client is 'TES0002' with surname 'TESTER', forename 'MR', date of birth '07/07/1919', address '49 NORTHWAY, MAGHULL, LIVERPOOL. 42. E5', and postcode 'L31 7BG'. A blue arrow points to the 'Client Code' column header.

| Client Code | Surname | Forename | DateOfBirth | Address | Postcode |
|-------------------------|---------|----------|-------------|---|----------|
| TES0004 | TEST | MR TEST | 01/01/2000 | SEFTON COMMUNITY EQUIPMENT STORE, UNIT 2C, BECHERS DRIVE, LIVERPOOL | L9 5AY |
| TES0002 | TESTER | MR | 07/07/1919 | 49 NORTHWAY, MAGHULL, LIVERPOOL. 42. E5 | L31 7BG |

Make sure that all the client's details are correct if not please change and click 'Update' to record any changes.



The screenshot shows the 'Update Client Details' form. It includes a message: 'Have you checked that all of the client details are correct? Remember weight, GP, height (children) phone number can change.' The form has fields for Client Code, Title, Forename, Surname, Address, Postcode, Mobile No, and SMS Allowed. A blue arrow points to the 'Update' button.

Continue

This will show you all the items of equipment that are out with your client.

To add a new order, click **'Create Delivery Order.'**

The screenshot shows the 'Client Orders' interface for 'South Sefton Store (SEFTON) (S)'. At the top, there are three buttons: 'Create Delivery Order', 'Return Item to Store', and 'Add Visit'. Below these, the page title is 'Client Orders - [SEFTON] South Sefton Store (SEFTON) (S)'. A section 'Working with client: TEST, TEST. [TES0004]' is visible. The 'Order Search' section contains fields for 'Order No', 'Requisition No', 'Order Status' (set to 'Current'), 'Item Code', 'Sort By' (set to 'Order No Ascending'), and 'Current Store Only'. A 'Search' button is at the bottom of this section. Below the search section, it says 'Show 50 entries'. A table of orders is displayed with columns: Order, Item, Description, Qty, Type, Priority, Order Status, Booking Status, and Referrer/User. The first row shows an order for 'SURE FOOT BATH BOARD' with a quantity of 1, type 'Delivery', priority 'Within 7 Days', status 'Allocated', and booking status 'BK00930282 on jny 06/07/23(AM)'. An arrow points from the text 'To add a new order, click 'Create Delivery Order.' to the 'Create Delivery Order' button.

To expand your search, Click **'Extra Options'**

The screenshot shows the 'Stock Catalogue' interface for 'South Sefton Store (SEFTON) (S)'. The page title is 'Stock Catalogue - [SEFTON] South Sefton Store (SEFTON) (S)'. Below the title, it says 'South Sefton Store (SEFTON) (S - Stock Catalogue)'. A section 'Working with client: TEST, TEST. [TES0004]' is visible. The 'Search Criteria' section has a 'Description' field, a 'Recents' dropdown, and a 'Favourites' field. The 'View As' section has a grid icon. The 'Extra Options' checkbox is checked. Below the search criteria, there are 'Search' and 'Back' buttons. An arrow points from the text 'To expand your search, Click 'Extra Options'' to the 'Extra Options' checkbox.

You can search by **Item Code** (SPA01 – Adult or SPC01 - Child) or by **Category** – Adult special order. Click **'Search'**

The screenshot shows the 'Stock Catalogue' interface for 'South Sefton Store (SEFTON) (S)'. The page title is 'Stock Catalogue - [SEFTON] South Sefton Store (SEFTON) (S)'. Below the title, it says 'South Sefton Store (SEFTON) (S - Stock Catalogue)'. A section 'Working with client: TEST, TEST. [TES0004]' is visible. The 'Search Criteria' section has a 'Description' field, a 'Recents' dropdown, and a 'Favourites' field. The 'View As' section has a grid icon. The 'Extra Options' checkbox is checked. Below the search criteria, there are 'Search' and 'Back' buttons. The 'Item Code' field is highlighted with a blue box and contains the text 'SPA01'. The 'Category' dropdown is also highlighted with a blue box and shows 'All Categories'. Arrows point from the text 'You can search by Item Code (SPA01 – Adult or SPC01 - Child) or by Category – Adult special order. Click 'Search'' to the 'Item Code' field, the 'Category' dropdown, and the 'Search' button.

Continue

Scroll down the page.

Search Criteria View As Extra Options

Description:

Item Code:

Referrer:

Category:

Recents:

Sort Order:

Special/Standard:

Max Page Results:

Favourites:

Wide Search: ☒

SWL over (kg):

| Code | Description | Available | Reviews | Required |
|-----------------------|--|-----------|---------------------------|--------------------------------------|
| SPA01 | Adult Special Order Needs Approval Prior To Ordering | 85 | 0 Reviews | 1 <input type="button" value="Add"/> |

You will find the item 'listed' or in a 'box'. Required is **1** and click **+Add**

All Categories

[SPA01](#) Adult Special Order
Needs Approval Prior To
Ordering

Available: 85
[0 Reviews](#)

1

Page 1 of 1. Go to page:

Click 'View **Basket**'

Clients & Orders ▾ Stock ▾ Session ▾ Select ▾ Utilities ▾ Links

Example, Referrer Elms2

Stock Catalogue - [SEFTON] South Sefton Store (SEFTON) (S)

South Sefton Store (SEFTON) (S - Stock Catalogue

Working with client: TEST, TEST. [\[TES0004\]](#)

Your shopping basket was updated.

Search Criteria View As Extra Options

Description:

Item Code:

Referrer:

Recents:

Sort Order:

Special/Standard:

Favourites:

Wide Search: ☒

SWL over (kg):

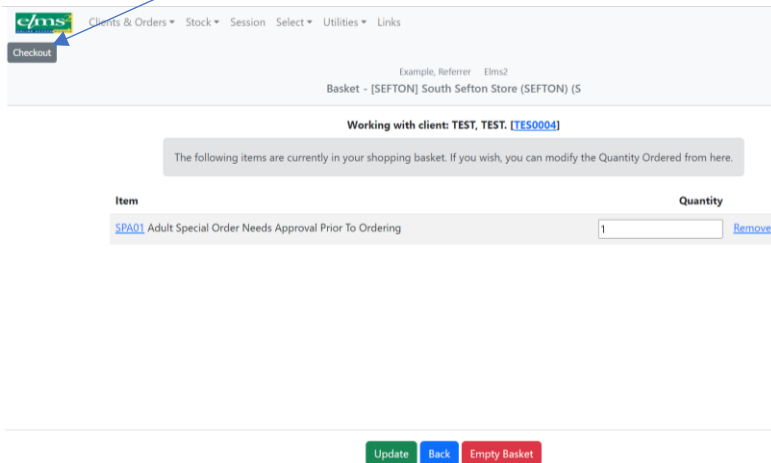
Page 1 of 1. Go to page:

1 Four

Continue

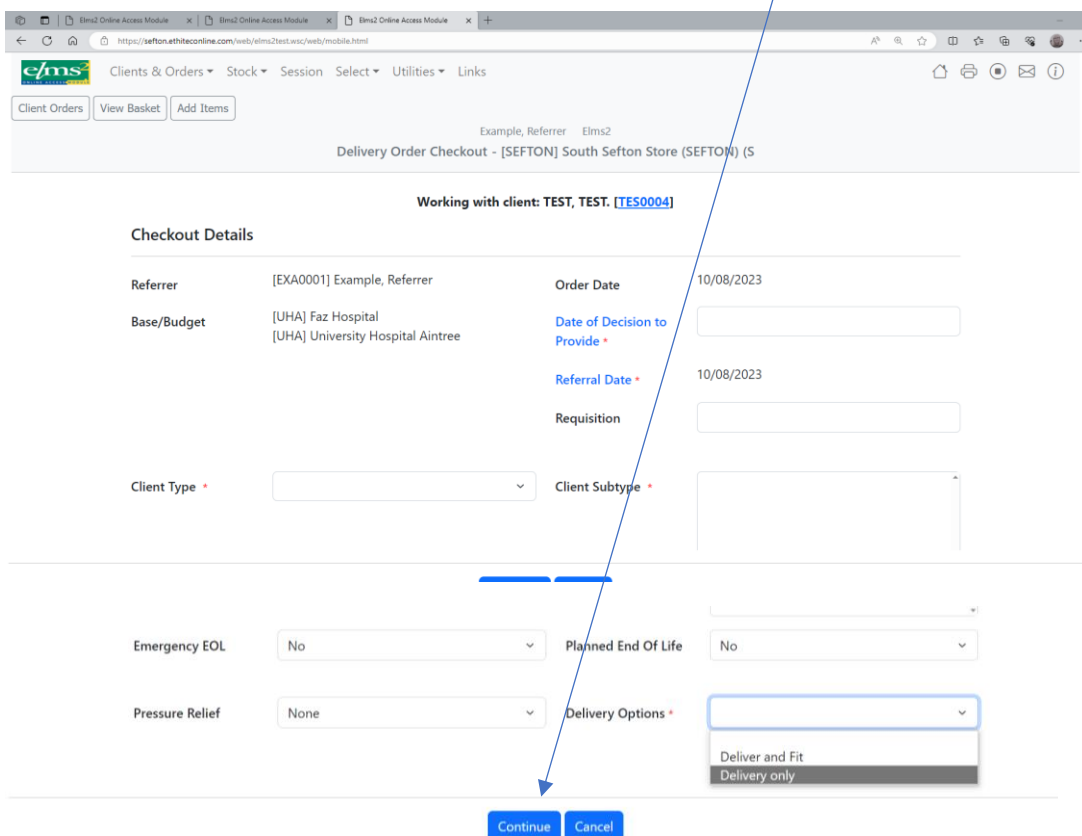
Make sure you only have your special order in the basket.

Click 'Checkout'.



The screenshot shows the 'e/ms' Checkout page. At the top, there's a navigation bar with 'e/ms' logo and links: Clients & Orders, Stock, Session, Select, Utilities, Links. Below this, a 'Checkout' button is highlighted with a blue arrow. The page title is 'Example, Referrer Elms2' and 'Basket - [SEFTON] South Sefton Store (SEFTON) (\$)'. A message states: 'Working with client: TEST, TEST. [TES0004]'. Below this, a note says: 'The following items are currently in your shopping basket. If you wish, you can modify the Quantity Ordered from here.' A table lists items with columns 'Item' and 'Quantity'. One item is shown: 'SPA01 Adult Special Order Needs Approval Prior To Ordering' with a quantity of '1' and a 'Remove' link. At the bottom, there are three buttons: 'Update' (green), 'Back' (blue), and 'Empty Basket' (red).

Enter all the order details on this page. Click 'Continue'.



The screenshot shows the 'e/ms' Delivery Order Checkout page. The navigation bar is the same as the previous page. Below the navigation bar, there are links: 'Client Orders', 'View Basket', and 'Add Items'. The page title is 'Example, Referrer Elms2' and 'Delivery Order Checkout - [SEFTON] South Sefton Store (SEFTON) (\$)'. A message states: 'Working with client: TEST, TEST. [TES0004]'. The page is divided into two sections. The top section, 'Checkout Details', contains fields for: 'Referrer' (Example, Referrer), 'Base/Budget' ([UHA] Faz Hospital, [UHA] University Hospital Aintree), 'Order Date' (10/08/2023), 'Date of Decision to Provide' (empty), 'Referral Date' (10/08/2023), 'Requisition' (empty), 'Client Type' (dropdown), and 'Client Subtype' (dropdown). The bottom section contains fields for: 'Emergency EOL' (No), 'Planned End Of Life' (No), 'Pressure Relief' (None), and 'Delivery Options' (dropdown with options 'Deliver and Fit' and 'Delivery only'). At the bottom, there are two buttons: 'Continue' (blue) and 'Cancel' (blue). A blue arrow points from the 'Continue' button in the previous section to the 'Continue' button in this section.

Continue

All adult special orders must be priority 'Adult Special Order'.

It is very important you select this priority - as this is what will inform us that an order has been placed.

EMS
Clients & Orders ▾ Stock ▾ Session ▾ Select ▾ Utilities ▾ Links

Client Orders Add Items

Elms2
Place Delivery Order - [SEFTON] South Sefton Store (SEFTON) (S)

Use this screen to go through and confirm all the orders you wish to place. Only those orders that have been confirmed will be created. x

Working with client: TEST, TEST. [TES0004]

| Select Item | Qty |
|--|-----|
| [SPA01] Adult Special Order Needs Approval Prior To Ordering | 1 |

[SPA01] Adult Special Order Needs Approval Prior To Ordering

ⓘ This item cannot be booked onto a journey.

Qty Required 1 (Available 85)

Priority * Within 7 Days

Short Term (weeks) Adult Special Order

Is this special order for hospital discharge? If so, what is the discharge date?
Click 'Confirm Order'

https://sefton.athloneonline.com/web/Elms2Test.aspx/web/mobile.html

Working with client: TEST, TEST. [TES0004]

| Select Item | Qty |
|--|-----|
| [SPA01] Adult Special Order Needs Approval Prior To Ordering | 1 |

[SPA01] Adult Special Order Needs Approval Prior To Ordering

ⓘ This item is already issued / allocated
ⓘ This item cannot be booked onto a journey.

Qty Required 1 (Available 84)

Priority * Within 7 Days

Short Term (weeks) 0

Req For Discharge * Yes

Discharge Date Yes

Equipment notes please read tooltip.

Confirm Order

Continue

Once you have the green tick click **'Continue'**

Example, Referrer Elms2

Place Delivery Order - [SEFTON] South Sefton Store (SEFTON) (S)

Use this screen to go through and confirm all the orders you wish to place. Only those orders that have been confirmed will be created. x

Order confirmed successfully. x

Working with client: TEST, TEST. [TES0004]

| Select Item | Qty |
|--|-----|
| [SPA01] Adult Special Order Needs Approval Prior To Ordering | 1 |

[SPA01] Adult Special Order Needs Approval Prior To Ordering

Qty Required: 1 (Available 85)

Priority: Adult Special Order (For Adult special orders only)

Update Order Remove Order Continue

From the drop down box click **'Add/Update details'** to open.

'Special Order Equipment document'

Example, Referrer Elms2

Order Document Entry

To add/edit/view the documents choose Add/Update Details. To upload a file click on the button below.

Working with client: TEST, TEST. [TES0004]

| Item | Document | Status |
|--|---|----------|
| Adult Special Order Needs Approval Prior To Ordering | SPECIAL ORDER ADULT EQUIPMENT - Non-catalogue | Required |

Add/Update Details

External Docs Cancel

Continue

Parts of the form will auto fill.

Please complete the form, providing special panel with as much information as possible. Giving full explanations as to why our client needs this special equipment.

Nobody can change the form once it has been saved and closed.

Example, Referrer Elms2

SPECIAL ORDER ADULT EQUIPMENT - Non-catalogue Test TEST (Mr) Born: 01-Jan-2000 (23y) Ref no: TE50004 **Events** **Equipment**

SPECIAL ORDER ADULT EQUIPMENT - Non-catalogue

Funding for specialist (non stock) equipment is not guaranteed as there is a great deal of pressure on the equipment budget. It is therefore essential that you provide as much information as you can. If insufficient information is supplied the panel will be unable to make a decision and this may result in delay for the client

Service User Details

| | |
|------------------------------|------------|
| Date Of Decision To Provide: | 10/08/23 |
| Client's Elms Code: | TE50004 |
| Ref no: | 1212121212 |
| JAS Number: | QPG |
| Full Name: | Test Test |
| Date Of Birth: | 01/01/00 |
| Weight: | 110 |
| Height: | 1.8 |

Line Manager Details

Name: test

Telephone Number: 0151 288 6208

Please confirm you have discussed this special order with your Line Manager / Team Leader ☒ Yes ☐ No

Priority

Priority 3

Risk Assessment Details

Please confirm that you have as far as currently possible undertaken all relevant risk assessments in relation to the safe use of this equipment by the client and their carers etc. Please confirm that it is suitable for safe use in the home environment, and that there are no obstacles preventing a safe delivery by the Equipment Service driver technicians. ☒ Yes ☐ No

Date of risk assessment: 10/08/2023

If YES what was the outcome of your application? test

If a CHC application is still under consideration, please confirm that you will notify the Equipment Service as soon as the outcome is known. ☒ Yes ☐ No

Reduction or prevention of care package?

Will this provision help to reduce a care package? ☒ Yes ☐ No

Will this provision help to prevent a package of care? ☒ Yes ☐ No

If you have said Yes to either of the above questions. Please can you provide us with more information please. test

Delivery Details

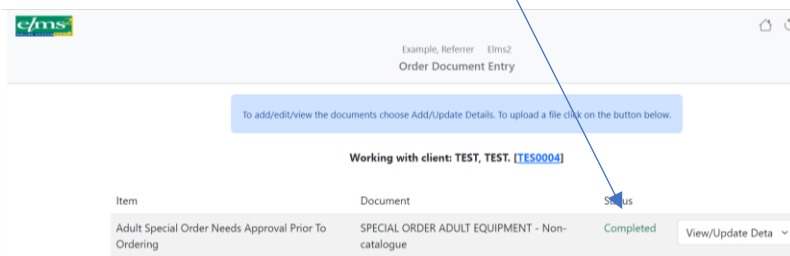
Are there any delivery details we should know about? test

Save Save and Close Cancel

Once your form has been completed press 'Save and Close'

Continue

The status will state **Completed**.

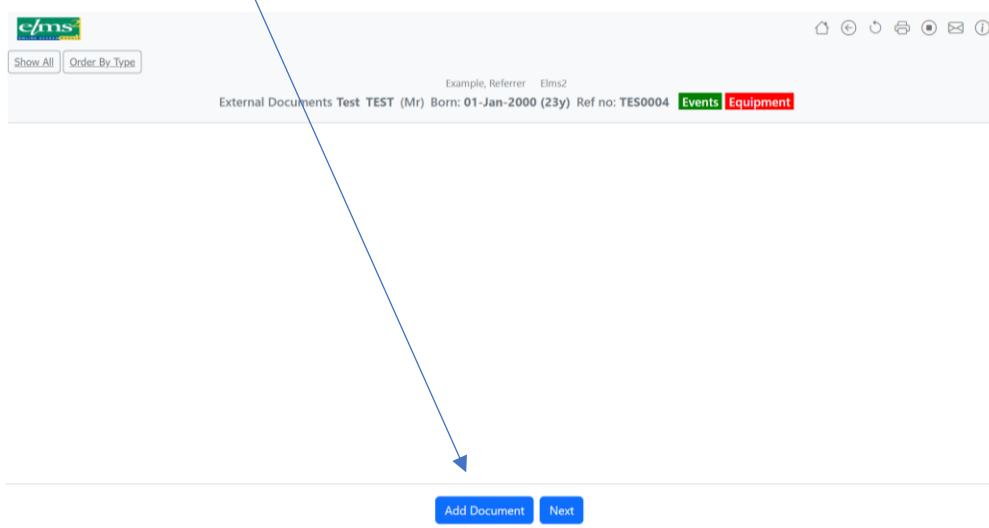


The screenshot shows the 'e/ms' interface for 'Order Document Entry'. It includes a header with 'Example, Referrer Elms2' and a sub-header 'Order Document Entry'. A blue instruction box states: 'To add/edit/view the documents choose Add/Update Details. To upload a file click on the button below.' Below this, it says 'Working with client: TEST, TEST. [TES0004]'. A table lists documents with columns 'Item', 'Document', and 'Status'. The first row shows 'Adult Special Order Needs Approval Prior To Ordering' as the item, 'SPECIAL ORDER ADULT EQUIPMENT - Non-catalogue' as the document, and 'Completed' as the status. A 'View/Update Details' button is next to the status.

| Item | Document | Status |
|--|---|-----------|
| Adult Special Order Needs Approval Prior To Ordering | SPECIAL ORDER ADULT EQUIPMENT - Non-catalogue | Completed |

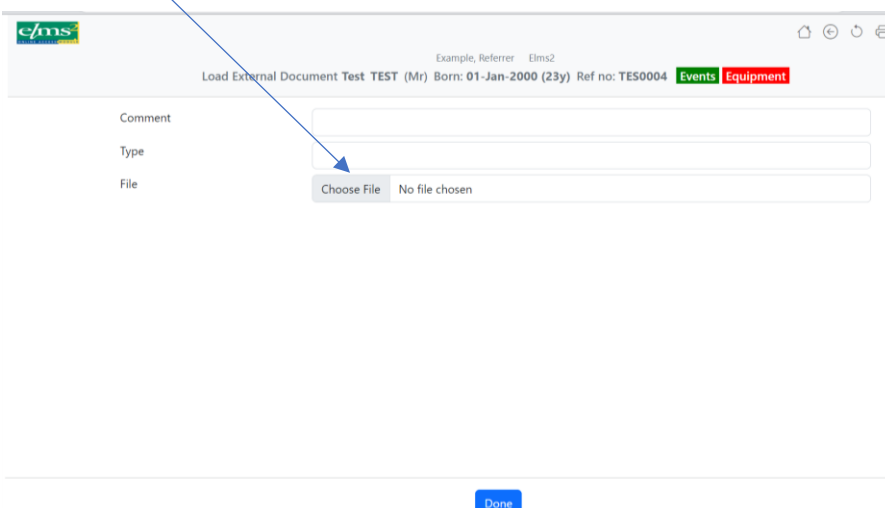
To add your quotations to the order, click **External Docs**.

Click **Add Document**



The screenshot shows the 'e/ms' 'External Documents' page. The header includes 'Example, Referrer Elms2' and 'External Documents Test TEST (Mr) Born: 01-Jan-2000 (23y) Ref no: TES0004'. There are tabs for 'Events' and 'Equipment'. At the bottom, there are two buttons: 'Add Document' and 'Next'. A blue arrow points from the text 'Click Add Document' to the 'Add Document' button.

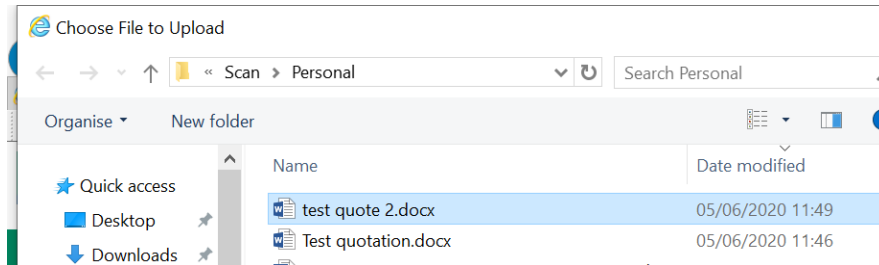
Click **Choose File** to find the quotations for this special order.



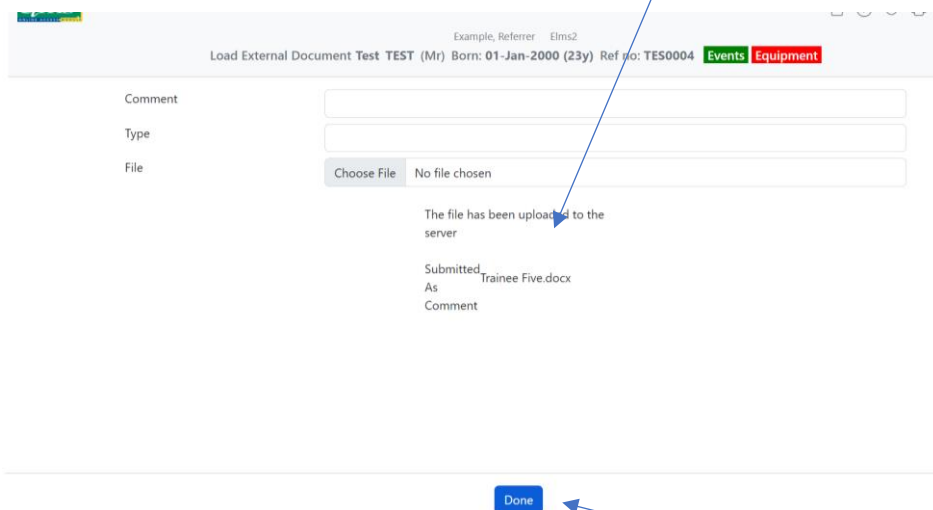
The screenshot shows the 'e/ms' 'Load External Document' page. The header includes 'Example, Referrer Elms2' and 'Load External Document Test TEST (Mr) Born: 01-Jan-2000 (23y) Ref no: TES0004'. There are tabs for 'Events' and 'Equipment'. Below the header, there are input fields for 'Comment', 'Type', and 'File'. The 'File' field has a 'Choose File' button and the text 'No file chosen'. A blue arrow points from the text 'Click Choose File' to the 'Choose File' button. At the bottom, there is a 'Done' button.

Continue

Search your PC for the saved quotes, click on the first one that you want to attach.

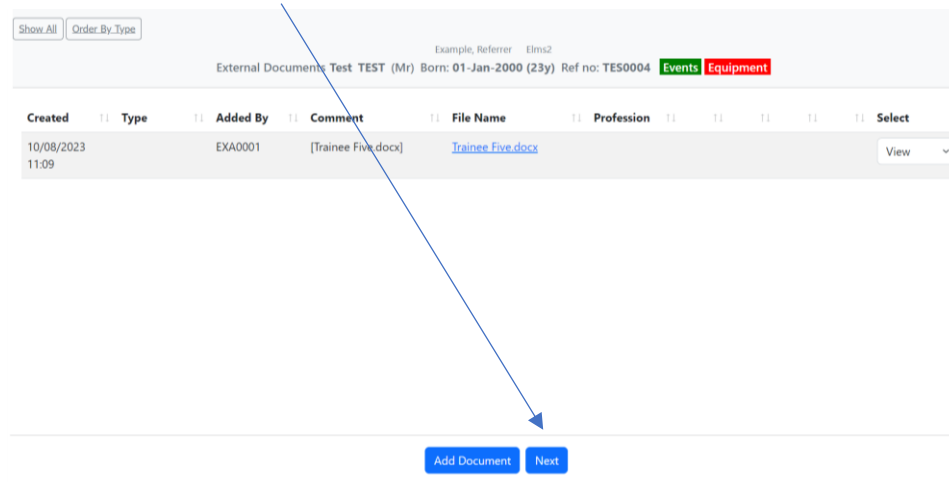


All attached quotes will show here on the order.



Once you have attached all the quotations click '**DONE**'

This screen shows what external documents you have added to your special order. Click '**Next**'.



Continue

Click 'Continue'.

Elms2
Example, Referrer Elms2
Order Document Entry

To add/edit/view the documents choose Add/Update Details. To upload a file click on the button below.

Working with client: TEST, TEST. [TES0004]

| Item | Document | Status | |
|--|---|-----------|------------------|
| Adult Special Order Needs Approval Prior To Ordering | SPECIAL ORDER ADULT EQUIPMENT - Non-catalogue | Completed | View/Update Deta |

External Docs Continue Cancel

Where are we delivering the goods too. Does the delivery address need to be changed? If so, click 'Change Booking Address'

Elms2
Clients & Orders Stock Session Select Utilities Links
Hold Orders - [SEFTON] South Sefton Store (SEFTON) (S)

Working with client: TEST, TEST. [TES0004]

Please enter any notes below.

Address Type
Property Type
Address
Subarea
Mobile No
Journey Type
Hold Reason
Booking notes please read tooltip

Elms Delivery Address
Owner Occupier
SEFTON COMMUNITY EQUIPMENT STORE, UNIT 2C, BECHERS DRIVE, LIVERPOOL L9 5AY
[Change Booking Address](#)
Aintree
07777 777777 7777
Normal
Restricted item on booking

Continue Cancel

If there is any information that you think our drivers will need to know please enter them in the 'Booking Notes'. EG. Client is slow to answer the door. Please deliver to back door not front door.

To complete this booking click 'Continue'.

Continue

All special orders are automatically placed on hold awaiting the outcome of the special panel decision.

This page also tells you what documents have been attached to the order.

If you have missed an external document, you can still add it from here just click '[Attach File.](#)'

When you reach this page, you have completed your special order and panel will consider it.

This page is printable for your records.

Details of Placed Orders - [DEF 1000] SOUTH SEFTON STORE [DEF 1000] 13

Working with client: TEST, TEST. [TES0004]

The following Delivery orders were successfully placed on the system. You may wish to print this page out for future reference.

Client Codes

| | | | |
|-----------|---------|----------|------------|
| Elms Code | TES0004 | NHS Code | 1212121212 |
| IAS/ICS | 54321 | | |

Booking Details - BK00930287

| | | | |
|---------------|---|---------------|----------------|
| Status | Held: Restricted Item On Booking | Delivery Date | Not On Journey |
| Pre Arranged | no | Delivery Type | Normal |
| Part Delivery | yes | Urgent | no |
| Notes | | | |
| Address | SEFTON COMMUNITY EQUIPMENT STORE UNIT 20 RECHERS DRIVE LIVERPOOL L9 5AY | | |

Email

Sign For

Order No 114

| | | | |
|-----------------------------|---|---------------|-----------|
| Item | SPA01 : Adult Special Order Needs Approval Prior To Ordering | Qty | 1 |
| Requested Date | 10/08/23 | Contact | |
| Date of Decision to Provide | 10/08/23 | Referral Date | 10/08/23 |
| Authorised | | | |
| Loan or Hire | Loan | Status | Allocated |
| Priority | Adult Special Order | | |
| Referrer | Example Referrer | | |
| Documents | SPECIAL ORDER ADULT EQUIPMENT - Non-catalogue [Trainee Five.docx] | | |

Attach File

Print

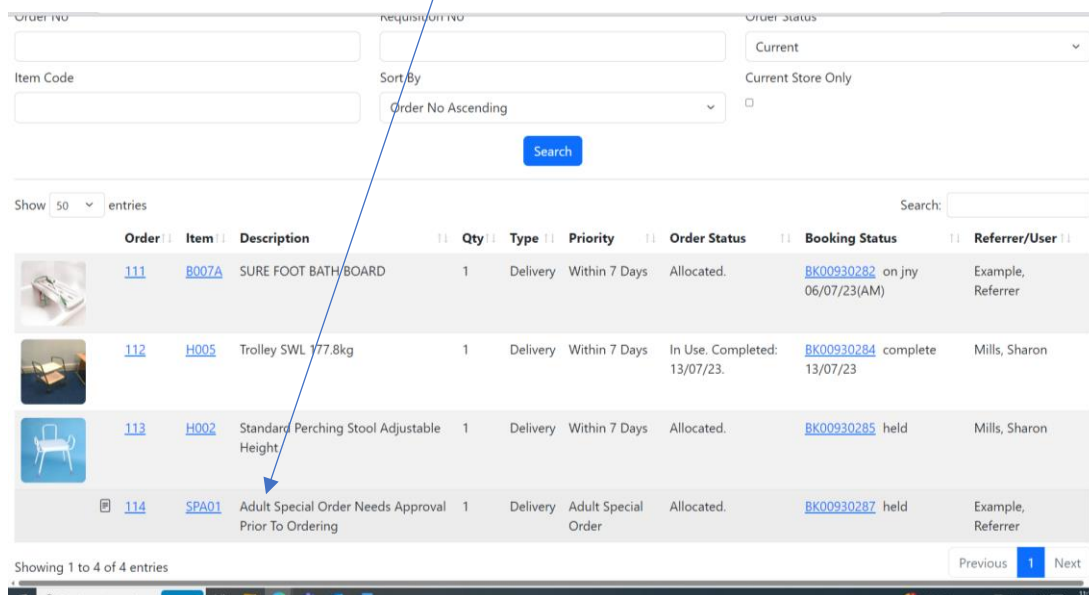
Printer Friendly

Finish

Please click [Finish](#).

Continue

This is what your special order looks like on your client's home page.



The screenshot shows a web interface for managing special orders. At the top, there are search filters for Order No, Requisition No, Item Code, Sort By (set to Order No Ascending), Order Status (set to Current), and Current Store Only. A 'Search' button is located below these filters. Below the search bar, there is a table with 10 columns: Order, Item, Description, Qty, Type, Priority, Order Status, Booking Status, and Referrer/User. The table contains 4 entries. The first three entries have icons: a bath board, a trolley, and a stool. The fourth entry, 'Adult Special Order Needs Approval Prior To Ordering', has a document icon. The table is paginated, showing 'Showing 1 to 4 of 4 entries' and navigation buttons for 'Previous', '1', and 'Next'.

| Order | Item | Description | Qty | Type | Priority | Order Status | Booking Status | Referrer/User |
|---------------------|-----------------------|--|-----|----------|---------------------|------------------------------|--|-------------------|
| 111 | B007A | SURE FOOT BATH BOARD | 1 | Delivery | Within 7 Days | Allocated. | BK00930282 on jny 06/07/23(AM) | Example, Referrer |
| 112 | H005 | Trolley SWL 77.8kg | 1 | Delivery | Within 7 Days | In Use. Completed: 13/07/23. | BK00930284 complete 13/07/23 | Mills, Sharon |
| 113 | H002 | Standard Perching Stool Adjustable Height | 1 | Delivery | Within 7 Days | Allocated. | BK00930285 held | Mills, Sharon |
| 114 | SPA01 | Adult Special Order Needs Approval Prior To Ordering | 1 | Delivery | Adult Special Order | Allocated. | BK00930287 held | Example, Referrer |

Please note: - you could be emailed for more information to support your application for specialist equipment.

Please can you send your email response to all email recipients as soon as possible. To help stop any delays for our clients.