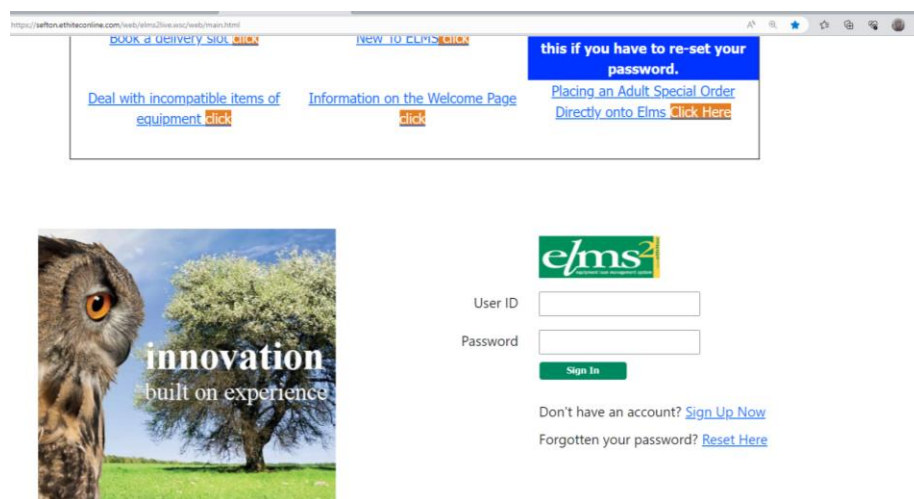


Creating an Order on ELMS

1. Log-in

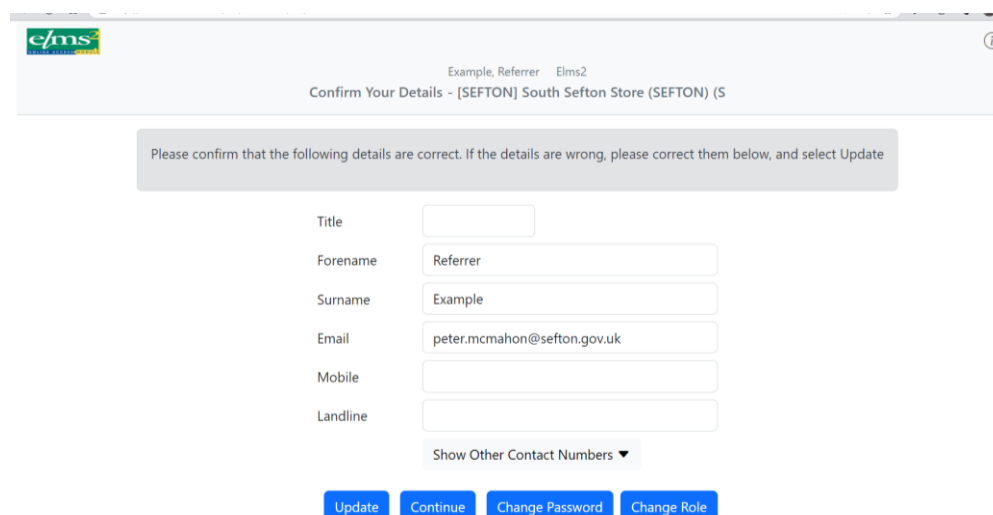
You will have been supplied with a user id and password by the service.

Enter these on the log in page.



The screenshot shows the ELMS login page. At the top, there are several links: 'book a delivery slot', 'new to elms', 'this if you have to re-set your password', 'Deal with incompatible items of equipment', 'Information on the Welcome Page', 'Placing an Adult Special Order Directly onto Elms', and 'Click Here'. Below these links is a large image of an owl with the text 'innovation built on experience'. To the right of the image is the ELMS logo and a login form with fields for 'User ID' and 'Password', a 'Sign In' button, and links for 'Sign Up Now' and 'Reset Here'.

At log-on you will see this screen.



The screenshot shows the 'Confirm Your Details' page. At the top, there is a header with the ELMS logo and the text 'Example, Referrer Elms2 Confirm Your Details - [SEFTON] South Sefton Store (SEFTON) (S)'. Below the header is a message: 'Please confirm that the following details are correct. If the details are wrong, please correct them below, and select Update'. The form contains fields for 'Title', 'Forename' (with the value 'Referrer'), 'Surname' (with the value 'Example'), 'Email' (with the value 'peter.mcmahon@sefton.gov.uk'), 'Mobile', and 'Landline'. There is a 'Show Other Contact Numbers' dropdown menu. At the bottom, there are four buttons: 'Update', 'Continue', 'Change Password', and 'Change Role'.

Check that your contact details are correct. If you need to edit them, do so and then press 'update.'

At each log-in you have the opportunity to change your password. You do not need to do this, simply press 'continue' to keep your password the same.

Continue

If you do update your password press 'update' after you have done so.

The next page allows you to access the main store and any satellite stores you access. If you are accessing a satellite store, select it from the drop down.

Example, Referrer Elms2

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

Please select the settings you wish to use for this session

Store: South Sefton Store (SEFTON) (S)

Referrer: South Sefton Store (SEFTON) (S)

Base: Magdalen house [MAGH]

Budget Holder: Social Services [SS]

Category: Occupational therapist

☐ Remember these settings

Continue

Instructions on placing an order from a satellite store are shown on the welcome page for each satellite store.

The following instructions apply to a request for home delivery, collecting from the Aintree store or arranging for delivery to a convenient order collection site.

If your base and budget holder are incorrect, please contact the service to change this.

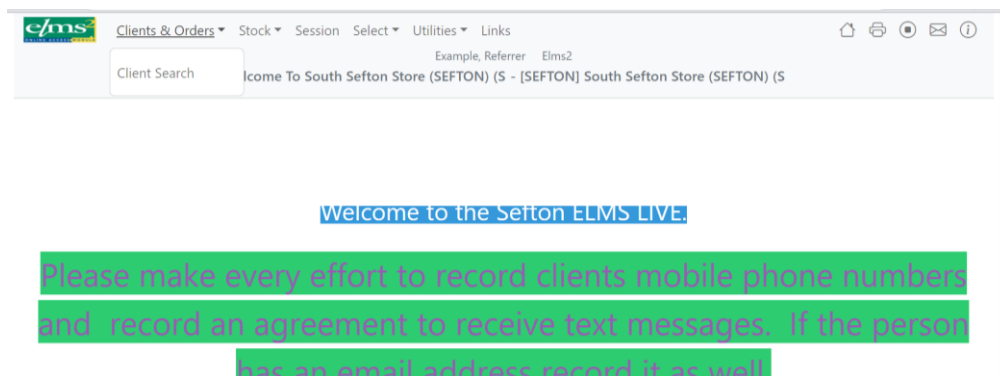
If everything is correct press 'continue.'

2. The welcome page.

The welcome page has important messages, hints, and tips on how to use the system to organise your order. It can be quite congested but scroll down and have a look at some of the available documents.

3. Searching for a client/patient

85% to 90% of our orders are for clients already registered on ELMS. You must search for a client before creating a new record. To do this look to the top left-hand side of the screen and click the drop down next to tab 'clients and orders,' the words 'client search' appear along with your most recently accessed client (if any).



Click on 'client search.'

A search box will open.

You can search on any of the fields. The 'code' field can be used for a client's ELMS code or their NHS number, but remember this is a database, if we have not yet recorded an NHS number it may not find an active client. Searches that the service find useful are combinations. In the surname field you can enter a comma (,) immediately after the surname and then the first initial to filter.

Example – Jones, a (surname field) who lives at number 26 (address field – no need to put the full address) or just Acacia Avenue (no number needed).

Date of birth is a helpful field if you can trust the client's accuracy.

When you press the search button all registered clients who satisfy the criteria you have entered will appear in a list. If you can identify the client you are dealing with, click on their ELMS code on the left-hand side of the screen.

Client Code	Surname	Forename	DateOfBirth	Address	Postcode
TES0004	TEST	MR TEST	01/01/2020	SEFTON COMMUNITY EQUIPMENT STORE, UNIT 2C, BECHERS DRIVE, LIVERPOOL, MERSEYSIDE	L9 5AY
TES0006	TEST (dec)	MR SECOND	01/05/1945	SEFTON COMMUNITY EQUIPMENT STORE, UNIT 2C, BECHERS DRIVE, LIVERPOOL, MERSEYSIDE	L9 5AY

If the client is not registered on ELMS, there is an option to 'Add Client.' **Please do not add a client until you are sure that they do not already have an ELMS record** (see adding a client below).

4. Client details

Clicking on the ELMS reference opens the client details screen. This holds basic contact and personal details.

The screenshot shows the 'Update Client Details' screen for client TES0004. The page has a header with navigation links: Clients & Orders, Stock, Session, Select, Utilities, and Links. Below the header is a sub-header with buttons: Client Orders, Send Event, Client Move, Other Addresses, Events, and Print. The main title is 'Update Client Details - [SEFTON] South Sefton Store (SEFTON) (\$)'. A blue banner at the top of the form area says: 'Have you checked that all of the client details are correct? Remember weight, GP, height (children) phone number can change.'

Main Details

Client Code	TES0004		
Title	MR	Gender	Male
Forename	TEST	Surname	TEST
Address	SEFTON COMMUNITY EQUIPMENT STORE UNIT 2C, BECHERS DRIVE LIVERPOOL MERSEYSIDE		
Mobile No	07777 777777 7777	SMS Allowed	No
Tel No	0151 288 6208	Client Email	
Next Of Kin Name		Next Of Kin Contact	
Date Of Birth	01/01/2020		
NHS Code	1212121212		

Deceased Details

Date of Death	Deceased	NO
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At the bottom of the form are three buttons: Back, Update, and Refresh.

Note. You can update these details, but if you do remember to press 'update' at the bottom of the screen before proceeding.

Note. If the client has moved to a new, permanent, address do not try and overwrite the address. Go to the 'client move' option and enter the new address. Hint, there is a postcode search function which should always be used. Click on the words 'post code' to open this function.

4(a) Adding a client.

If, and only if, you have checked and the person is not already registered on ELMS, you can add a new record.

Select the add client option, fill in the client's basic details (please use post code search for addresses as this helps with defining routes for the delivery drivers – click on the words post code to open this function).

You will also be asked to provide weight and height for the patient, an NHS number or other reference code (IAS for SMBC) and the details of the client's GP. There is a search function for the GP details, click on the highlighted words GP-Code.

IMPORTANT Press update when you have entered the new client detail.

5. Placing an order – this is done whilst you are in the client's record.

When you are in the client's record there is a tab 'client orders,' click on this.

The screenshot shows the 'eims2' web application interface. At the top, there is a navigation bar with links: 'Clients & Orders', 'Stock', 'Session', 'Select', 'Utilities', and 'Links'. Below this, a secondary bar contains buttons: 'Client Orders' (highlighted), 'Send Event', 'Client Move', 'Other Addresses', 'Events', and 'Print'. The main content area is titled 'Update Client Details - [SEFTON] South Sefton Store (SEFTON) (\$)' and includes a light blue informational box that reads: 'Have you checked that all of the client details are correct? Remember weight, GP, height (children) phone number can change.' Below this is the 'Main Details' section, which contains a form with the following fields: 'Client Code' (TES0004), 'Title' (MR), 'Gender' (Male), 'Forename' (TEST), 'Surname' (TEST), 'Address' (SEFTON COMMUNITY EQUIPMENT STORE, UNIT 2C, BECHERS DRIVE), and 'Postcode' (L9 5AY). At the bottom of the form are three buttons: 'Back', 'Update', and 'Refresh'.

You then have the option via tabs to add delivery, add collection (if the client has equipment already), add visit.

A delivery is the issue of new equipment.

A collection is the collection back to the store of equipment in use.

A visit is a call by one of our drivers to adjust or troubleshoot a problem with existing provision.

Select Create Delivery Order.

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

Create Delivery Order Add Visit

Example, Referrer Elms2
 Client Orders - [SEFTON] South Sefton Store (SEFTON) (\$)

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

Order Search

Order No Requisition No Order Status

Item Code Sort By Current Store Only ☐

Search

The following screen appears, click in the extra options field.

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

Example, Referrer Elms2
 Stock Catalogue - [SEFTON] South Sefton Store (SEFTON) (\$)

South Sefton Store (SEFTON) (\$ - Stock Catalogue

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

Search Criteria ▴ View As ▢ Extra Options ☐

Description Recents Favourites

Search Back

This opens the stock catalogue search fields.

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

Example, Referrer Elms2
 Stock Catalogue - [SEFTON] South Sefton Store (SEFTON) (\$)

South Sefton Store (SEFTON) (\$ - Stock Catalogue

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

Search Criteria ▴ View As ▢ Extra Options ☒

Description Recents Favourites

Item Code Sort Order Wide Search: ☒

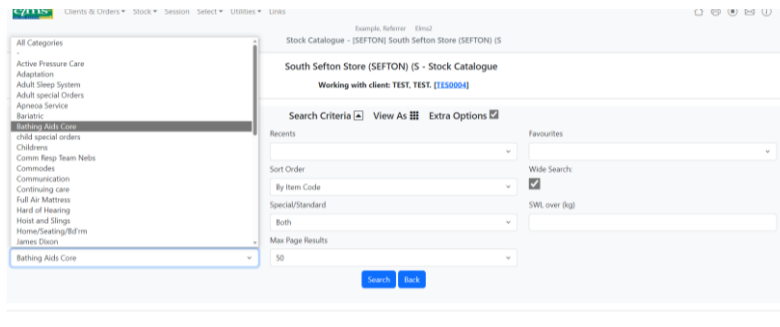
Referrer Special/Standard SWL over (kg)

Category Max Page Results

Search Back

Continue




If you know the item code for the equipment you need enter it in the 'code' field, if not use the drop down for 'category.' Items are categorised according to type of equipment. For example, Bathing aids.



If your search results in a list of items, then the list may extend to more than one page. There are arrows at the bottom of the screen to move from page to page.

Here the search is for Bathing Aids.

Referrer	By Item Code	<input checked="" type="checkbox"/>	SWL over (kg)
All Categories	Special/Standard		
Category	Both		
Bathing Aids Core	Max Page Results		
	50		
<input type="button" value="Search"/> <input type="button" value="Back"/>			

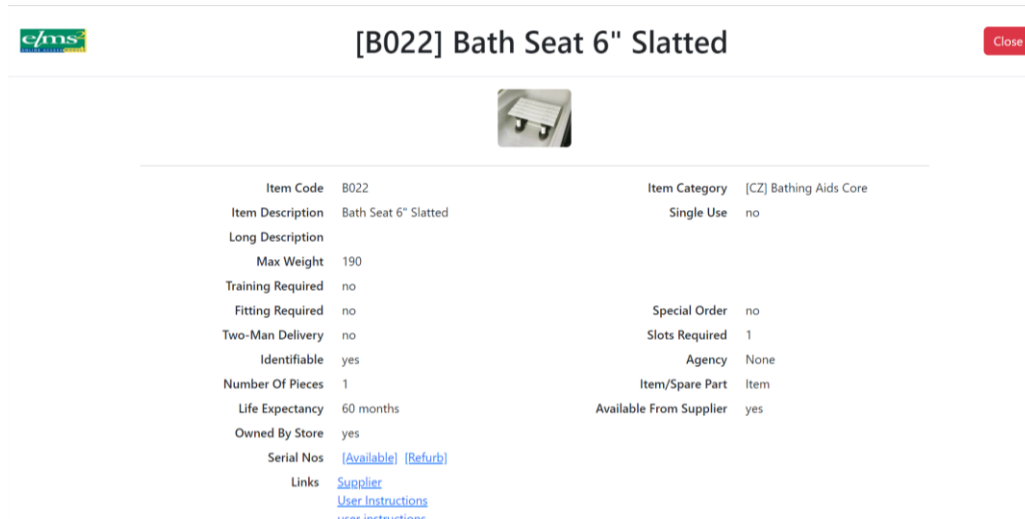
Code	Description	Available	Reviews	Required
 B007A	SURE FOOT BATH BOARD	0	0 Reviews	1 <input type="button" value="Add"/>
 B022	Bath Seat 6" Slatted	7	0 Reviews	1 <input type="button" value="Add"/>
B031B	Cushioned Bath Transfer Bench	1	0 Reviews	Referrers may only view item
 B032	Shower Stool Standard	11	0 Reviews	1 <input type="button" value="Add"/>

Page 1 of 1. Go to page: Found 15 results

You will note that some items, have a small '?' next to the code. This is called a tool tip, providing further information about ordering this equipment.

Clicking on the item code will open another window giving more detail about the equipment including user weight restrictions or links to suppliers' websites.

Click **Close** to return to previous page.

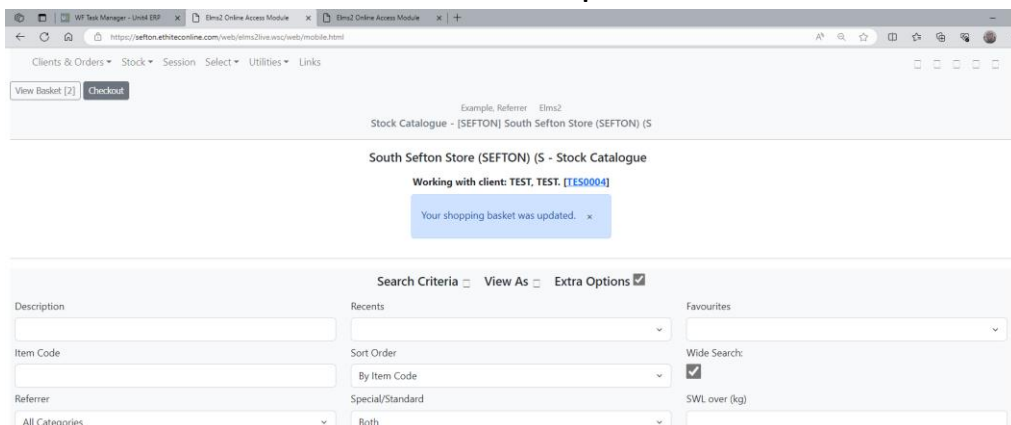


The screenshot shows a product detail page for 'B022 Bath Seat 6" Slatted'. At the top left is the 'cms' logo. The title 'B022 Bath Seat 6" Slatted' is centered, with a 'Close' button on the right. Below the title is a small image of the bath seat. The main content area is a table with two columns of product details.

Item Code	B022	Item Category	[CZ] Bathing Aids Core
Item Description	Bath Seat 6" Slatted	Single Use	no
Long Description			
Max Weight	190		
Training Required	no		
Fitting Required	no	Special Order	no
Two-Man Delivery	no	Slots Required	1
Identifiable	yes	Agency	None
Number Of Pieces	1	Item/Spare Part	Item
Life Expectancy	60 months	Available From Supplier	yes
Owned By Store	yes		
Serial Nos	[Available] [Refurb]		
Links	Supplier User Instructions Clear Instructions		

To order the equipment select 'Add' on the right-hand side. When there is no stock of an item, alternatives may be suggested by the system. You can still order an item even though stock is not available, it will go to a waiting list, stock is being replenished constantly and when the item is in stock your order will be processed.

Once you have placed the item(s) you need into the shopping basket select 'Checkout' at the top of the screen.



The screenshot shows the 'South Sefton Store (SEFTON) (S - Stock Catalogue)' interface. At the top, there's a navigation bar with 'Clients & Orders', 'Stock', 'Session', 'Select', 'Utilities', and 'Links'. Below this is a 'View Basket [2]' button and a 'Checkout' button. The main heading is 'South Sefton Store (SEFTON) (S - Stock Catalogue)'. Below the heading, it says 'Working with client: TEST, TEST. [TES0004]'. A blue notification box states 'Your shopping basket was updated.' Below this is a search section with 'Search Criteria', 'View As', and 'Extra Options' (checked). The search section includes input fields for 'Description', 'Item Code', and 'Referrer', and dropdown menus for 'Recents', 'Sort Order' (set to 'By Item Code'), 'Favourites', 'Wide Search' (checked), and 'SWL over (kg)'. At the bottom, there are dropdowns for 'All Categories' and 'Both'.

Continue

This brings you to the details of your referral.

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

Working with client: TEST, TEST. [TES0004]

Checkout Details

Referrer	[EXA0001] Example, Referrer	Order Date	01/08/2023
Base/Budget	[SS] Sefton Social Services [MAGH] Magdalen house	Date of Decision to Provide *	01/08/2023
		Referral Date *	01/08/2023
		Requisition	
Client Type *	C11 Cancer	Client Subtype *	
Emergency EOL	No	Planned End Of Life	No
Pressure Relief	None	Delivery Options *	Deliver and Fit

Continue



Cancel


Click on the link 'date of decision to provide' to open a calendar to select the appropriate date. 'Client type' and 'delivery options' are drop down mandatory fields. (Please note that Client Subtype is not mandatory). When complete, press continue.


Continue

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
[B022] Bath Seat 6" Slatted	1 
[B033] Shower Stool (Corner) Cor	1 

[B022] Bath Seat 6" Slatted 



Qty Required 1 (Available 7)

Priority *

Short Term (weeks) [Clear](#)

Req For Discharge *

Discharge Date

Equipment notes
please read tooltip.

This is about the equipment for example,
set at a specific height.

[Confirm Order](#)

Move down the list of equipment confirming the required detail (on the right) for each item ordered. Notes here are about the equipment itself for example 'set to its highest setting.' These notes are not seen until the day of delivery and should not be used for messages about the delivery journey.

Remember to get the order priority right, urgent deliveries are 48- hour priority, others are 7 days. Please only use 48-hour priority where the urgency relates to the client's needs.

Required for discharge relates to hospital discharge, not discharge from your caseload.

As you complete the detail on the right-hand side the **red X** will change to a green tick after you have pressed confirm.

Confirm each item in turn.

Working with client: TEST, TEST. [TES0004]

Select Item	Qty
[B022] Bath Seat 6" Slatted	1 <input checked="" type="checkbox"/>
[B033] Shower Stool (Corner) Cor	1 <input checked="" type="checkbox"/>

[B022] Bath Seat 6" Slatted

Qty Required 1 (Available 7)

Priority * Within 7 Days

Short Term (weeks) 0 [Clear](#)

Req For Discharge * No

Discharge Date

Equipment notes please read tooltip. Make sure this set at optimum height for the bath.

This is about the equipment for example, set at a specific height.

Update Order Remove Order Continue

cmss Clients & Orders Stock Session Select Utilities Links

Client Orders Add Items

Example Referrer Elm2

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
[B022] Bath Seat 6" Slatted	1 <input checked="" type="checkbox"/>
[B033] Shower Stool (Corner) Cor	1 <input checked="" type="checkbox"/>

[B033] Shower Stool (Corner) Cor

Qty Required 1 (Available 23)

Priority * Within 7 Days

Short Term (weeks) 0 [Clear](#)

Req For Discharge * No

Discharge Date

Equipment notes please read tooltip.

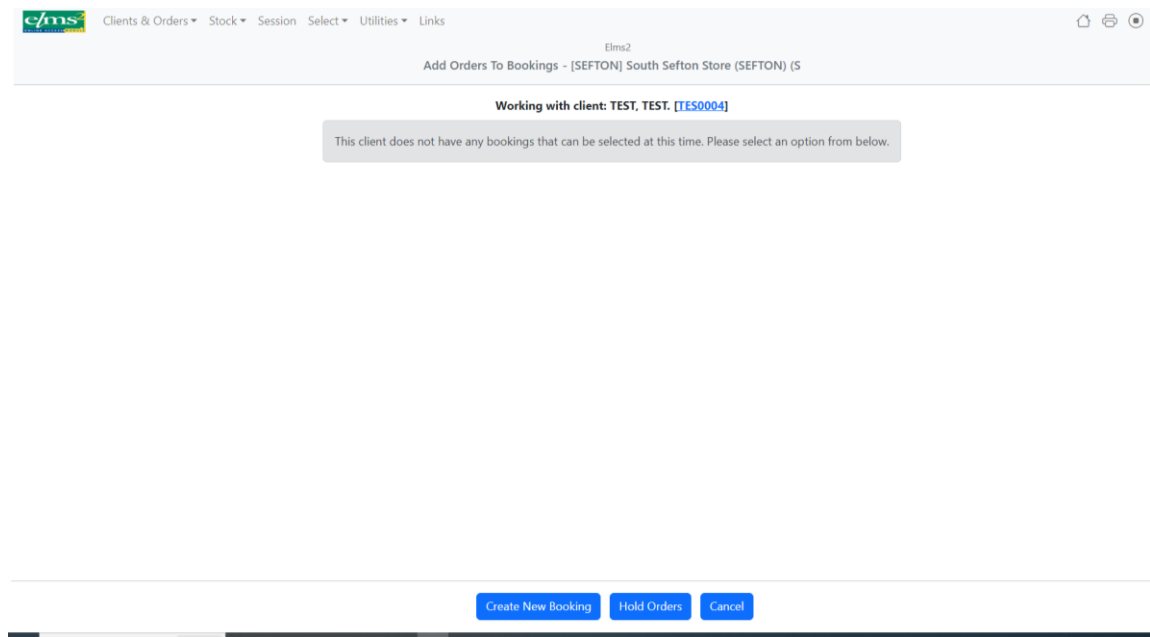
Update Order Remove Order Continue

When all ticks are green press continue.

Continue

6. Booking the delivery

You are now ready to book the delivery journey.



The screenshot shows the e/ms system interface. At the top, there is a navigation bar with the e/ms logo and menu items: Clients & Orders, Stock, Session, Select, Utilities, and Links. On the right side of the navigation bar, there are icons for home, print, and a user profile. Below the navigation bar, the page title is "Add Orders To Bookings - [SEFTON] South Sefton Store (SEFTON) (\$". The main content area displays "Working with client: TEST, TEST. [TES0004]". Below this, a message states: "This client does not have any bookings that can be selected at this time. Please select an option from below." At the bottom of the interface, there are three buttons: "Create New Booking", "Hold Orders", and "Cancel".

In the image shown above, the options are to ‘[Create New Booking](#), [Hold Orders](#), [Cancel](#). Sometimes if an existing delivery has been booked by someone else you can add to their delivery. Please use this option to save on delivery journeys. Do not book separate delivery slots for each piece of equipment.

Continue

When you create a new booking, you will see the dates available for your delivery. Click into the circle on the right for the delivery journey you require.

Journey

N: Delivery Area 5 AM

Urgent

No

Pre Arranged

No

Part Delivery

Yes

Booking notes please read tooltip

Only seen on day of delivery. Please email our Customer Service Team if you require us to contact your client to pre-arrange this delivery.

Refresh

Delivery Address

Address Type

Elms Current Address

Type

Owner Occupier

Address

MR TEST TEST

Name

Address

SEFTON COMMUNITY EQUIPMENT STORE, UNIT 2C, BECHERS DRIVE, LIVERPOOL, MERSEYSIDE. L9 5AY

Subarea

Aintree

Tel No

0151 288 6208

Mobile No

07777 777777 7777

This address requires a two person delivery

Change Address

Day	Date	Am Pm Day	Free Slots	Select
Fri	04/08/23	AM	10	<input type="radio"/>
Mon	07/08/23	AM	14	<input checked="" type="radio"/>
Tues	08/08/23	AM	15	<input type="radio"/>
Wed	09/08/23	AM	15	<input type="radio"/>
Thu	10/08/23	AM	15	<input type="radio"/>
Fri	11/08/23	AM	15	<input type="radio"/>
Mon	14/08/23	AM	15	<input type="radio"/>
Tues	15/08/23	AM	15	<input type="radio"/>
Wed	16/08/23	AM	15	<input type="radio"/>
Thu	17/08/23	AM	15	<input type="radio"/>

>>

Delay Reason:

Cancel

Hold Orders

Continue

On the right-hand side, you can arrange to collect the order from a designated site such as the store. Use the journey drop down to select this. For home deliveries leave the journey at the default delivery area 1,2 5 or 6.

If you have arranged with the client to deliver on a given date let the service know by setting the field, pre-arranged, to yes.

Continue

Notes are notes about the delivery on this occasion e.g., Mr Smith next door has a key, do not expect notes requesting phone calls predelivery date to be actioned if they are entered here. The driver will be the first person to see this note on the day of delivery.

You can arrange to have equipment delivered to a different address from the client's permanent address by selecting 'use other address.' This is not a permanent move; this is a one-off delivery to that address.

When you have selected the day of delivery and completed the right-hand side of the screen as required press ['continue.'](#)

This leads to a printout of your order which is now complete.

This printout has some important features particularly in relation to urgent and two person deliveries.

For heavier equipment the service needs to send two drivers to fit equipment. For this reason, referrers are not permitted to book the journey date for the delivery. This is controlled by the team at the store.

These deliveries automatically go on-hold, and a notification is sent to the team advising of the held booking.

Some two person deliveries will be pre-arranged for a given date by the referrer and in the case of very urgent cases, urgent

pressure care, unplanned hospital deliveries and end of life cases
some deliveries may be needed the same day as the order.

Referrers should use the email function on the printout page to
notify the service of their requirements. Press the **Email**.

Example Referrer Elms2
Details Of Placed Orders - [SEFTON] South Sefton Store (SEFTON) (5)

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 - BK00938737			
Status	On Iny	Delivery Date	07/08/23
Pre Arranged	no	Delivery Type	Normal
Part Delivery	yes	Urgent	no
Notes			
Address	SEFTON COMMUNITY EQUIPMENT STORE, UNIT 2C, BECHERS DRIVE, LIVERPOOL, MERSEYSIDE L9 5AY		
Tel No	0151 288 5208		

[Email](#) [Sign For](#)

Order No 111			
Item	8033 Shower Stool (Corner) Cor	Qty	1
Requested Date	01/08/23	Contact	
Date of Decision to Provide	01/08/23	Referral Date	01/08/23
Authorised			
Loan or Hire	Loan	Status	Allocated
Priority	Within 7 Days		
Referrer	Example Referrer		

[Print](#) [Printer Friendly](#) [Finish](#)

Example, Referrer Elms2
Send Booking Email **Test TEST** (Mr) Born: **01-Jan-2020 (3y)** Ref no: TES0004 **Events** **Equipment**

Send To

CC Yourself? ☒

Subject

Details

Please can you arrange for this to be delivered urgently.

Attachments ☒ Delivery Note **BK00938737**

[Send](#) [Cancel](#)

Continue

Send the email to equipment.service@sefton.gov.uk detailing your requirements.

These emails are approved for GDPR purposes and should be used to pass on extra messages relating to your order not entered elsewhere.

Contact details for the service.

Tel 0151 288 6208.

Email equipment.service@sefton.gov.uk

01.08.2023