

AIDACARE ETAC Portal

Client

USER GUIDE VERSION 2.0
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Overview

This document is intended to help you understand how to use the Aidacare E-TAC Portal and to gain insight into some of the features & benefits.

The E-TAC system has been designed with the TAC Claim Staff, Prescriber and Client in mind, for their common requirements and their specific requirements. Each of the users accesses then a tailored portal for his or her role.

The key objectives this portal is designed to achieve are:

1. Providing comprehensive product information allowing for ordering the right product, whether hire or purchase.
2. Bringing the Client, Prescriber and TAC Claim staff together to the same system and allowing all three stakeholders to have 360 degree view on their clients while complying with TAC privacy policy.
3. Simplifying the order processing for each role across Purchase/Hire order, Home Modifications or Repair Requests.
4. Complying with TAC business rules with regards to value limits for ordering and allow for seamless quotation approval process between Prescribers, Clients and TAC Claim staff.
5. Implementing best in class ecommerce solutions from other industries in general and other governmental contracts in particular.

This user guide is for Client to use. Due to different functionality for different roles, there is a separate user guide for Prescribers or TAC staff.

We hope that the site is intuitive and easy to use. For any suggestion you may have, please contact Aidacare's Ecommerce team on 1300 243 248 or ecommerce@aidacare.com.au.

Features Overview

Three distinguished order types. The E-TAC portal was developed with you in mind and we created three distinguished order types. Purchase/Hire orders are for ordering equipment for purchase or hire, with the ability to enter start and end date for hire. Home Mods orders are for ordering equipment and labour for home modifications, with the ability to upload drawings, photos or use the free drawing tool. Repair Request is a quick process to submit a repair request on Aidacare while capturing a description of the problem.

Detailed Dashboards. Providing you with full visibility of all orders you have raised, their status, historical data and reference point for all orders for a specific clients. Used by TAC Claim Staff, Prescribers and Clients as well, is a true 360 degree view on each of the clients.

Integrated Quote Approval Process. Providing you with ultimate visibility for products pre-approved vs required approval by TAC, processing quotes for TAC to review and, for you, to receive automated notification on the status of the quotes all in seamless flow.

Order and line item status. Providing TAC Claim Staff, Clients and the Healthcare Providers with the detailed status of the order, for both the whole order and individual line items, ensuring you are aware of the status of each piece of equipment you order from us.

Prescriber Address Book. Providing Clients and TAC Claim Staff with address book of common used Prescribers for repeated ordering. Adding a prescriber to your order, will provide your prescriber with visibility into the order and order status and will help him or her to support you better.

Purchase and Hire on the same order. You no longer need to raise separate orders for purchase and hire equipment. Now you are able to bundle them together into one order and still manage each line item separately. Hire items will remain active while on Open Hire while Purchase items will be closed once delivered.

Comprehensive Product Information. The product catalogue is structured based on TAC categorisation for ease of navigation. Each product includes a clear list of features and benefits together with all the technical dimensions and specifications providing you with one place for all product information, for accurate ordering.

Unlimited Draft Orders. You can create a draft order and complete it when you have more time.

In-built Home Modification Draw Function. Both the website and the iPad Application have in-built home modifications draw functions allowing you to take a photograph and then draw and write on it to document your desired modifications.

Attribute Selection for Complex Products. We've heard that the ordering of compression garments, orthoses and other similar is complex (sizes, colours, compression etc.). We've simplified things by identifying the necessary Attributes that require selection. This will help ensure that the right product is delivered.

Support. Dedicated Ecommerce team with 1300 number to receive your call, dedicated email address to receive your emails and an Online Chat functionality to quickly ask questions about how to use the system or raise any other question that you may have.

Pre-approved products and Quotation Process

TAC has recently changed their rules and now supports a comprehensive list of pre-approved products. However, approval is still required in the following circumstances:

1. When the product value is greater than \$1,000.
2. When the hire period exceeds the pre-approved hire period.

When an approval is required, TAC requires a quote from you, the client or prescriber, with product information and clinical justification.

Aidacare's ETAC Portal facilitates the new TAC rules and simplifies the quotation process.

1. Each purchase product in the online portal is flagged whether it is pre-approved for purchase.
2. Each hire item product in the online portal is flagged with the number of pre-approved weeks.
3. When you process an order, if the requested hire period is longer than the pre-approved hire period, you are notified at the time of ordering and can then adjust your order.
4. When you submit the order, it is submitted as a quote to TAC with all the information you have entered. No need to send another email to TAC!
5. When TAC approves the order, the order is then automatically submitted to Aidacare and you will receive a confirmation email. There is no need to follow up with TAC or Aidacare to process the order again.

In the sections below you will be guided as to how this process is embedded into the different parts of the portal.

Login Page & Registration

Locate the Aidacare E-TAC Portal login page by navigating to: <https://etac.aidacare.com.au>

If you are a first time user then click “Client - Registration” and follow the registration instructions. You will receive an email from us once the account has been verified and activated.



eTAC - TAC Portal

Email*

Password*

Remember me [Forgot Password](#)

Login

TAC Staff - Registration

Prescriber - Registration

Client - Registration

General Navigation

The homepage is the first page you will see after logging in.

The mega menu on the top will allow you to access all functions of the site. You can hover on the individual items and see further options.

Quick Actions on the left were carefully selected to provide you with the quickest way to complete the task that you require.



Mega Menu

- Home – will always take you back to the homepage.
- Dashboard – to view order status, search for orders or end a hire.
- Products – the TAC contracted product catalogue.
- New Order – will allow you to choose the type of order you want to raise:
 - New Purchase / Hire Order – for quickly raising new orders for purchase or hire equipment.
 - New Home Mods Order – for raising a home modification order including associated products.
 - New Repair Request – for raising a repair request for your client.
- My Account – will allow you to access and update your details, your Prescriber Address Book, your nominated supplier and nominated installer and change your password.
- Contact & Help – general contact information and access to this user guide.

Quick Actions

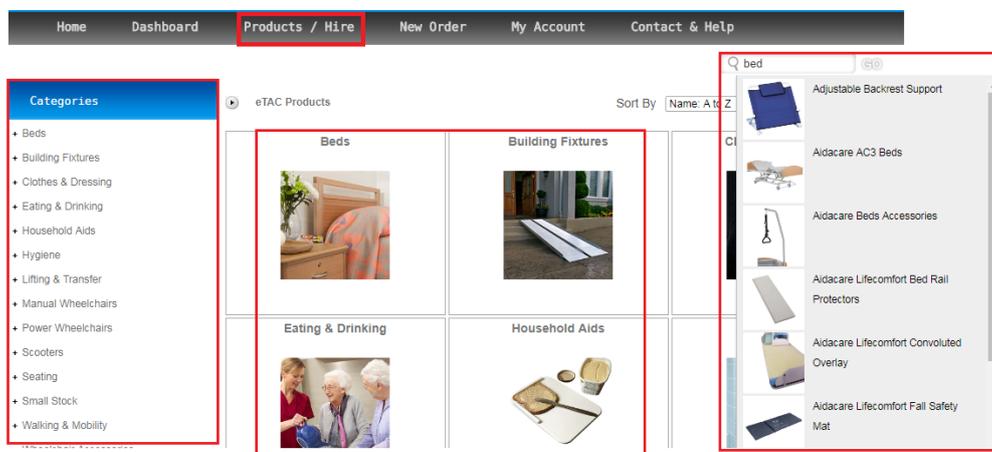
- New Purchase / Hire Order – for quickly raising new orders for purchase or hire equipment.
- New Home Mods Order – for raising a home modification order including associated products.
- New Repair Request – for raising a repair request for your client.
- My Open Orders – for checking the status of the open orders you raised on the dashboard.
- My Open Hire Orders – for checking the status of open hire orders and being able to end the hire.
- My Completed Orders – for referring back to closed orders.

Product Catalogue

This is the product catalogue, similar to other best in class ecommerce websites.

Key features include:

- The catalogue list, on the left, is structured based on the TAC categorisation of products. Using the TAC language assists you in finding the product where you would expect to find it.
- The category tiles in the middle, are useful if you prefer to navigate in a visual way based on images.
- The Predictive search field, on the right, helps you with searching products, and will show you the immediate results based on your search.



Product Detail Page

The first part of the product detail page provides you with comprehensive product data. Right to the images, you will find the Features & Benefits listed. Below them there is the size guide which provides a full suite of product specifications, both can be used together to select the right product for your client.

Aspire Premium Homecare Bed



Features and Benefits

- Combines a sleek stylish design with superior comfort and functionality
- Designed with personal design attention allowing it to fit subtly into any home environment
- Head and foot boards with adjustable side rails in a beech timber finish form a traditional bed surround when lowered to compliment a homely interior and care facilities alike
- This robust bed can also be easily assembled and dismantled for ease of transport and storage when not in use
- Designed for the home environment with 5 profiling functions to suit all comfort and positioning needs
- High-low
- Backrest (60 °)
- Knee bend (30 °)
- Trendelenburg (10.5 °)
- Combined backrest and knee bend
- Beech full length side rails
- Beech head and foot boards
- Integrated bed extension
- Four total-lock castors
- Self-help pole
- Mattress retainers
- TIMotion electronics
- Large lifting range

Sizing Guide

Code	Description	Total Length	Total Width	Total Height	Mattress Dimensions	Mattress Platform Lengths	S.W.L
BEB046050K	Community Care Bed - 4 Function	2140 - 2240 mm	1025 mm	220 - 710 mm	2000 x 900 mm	2020 - 2120 mm (25 mm increments)	180 kg

The second part of the product detail page is the product selector and it contains critical information for you:

1. The product SKU and name. The product name may contain some key information to help with the correct selection.
2. Order Type –
 - a. Buy – the option to purchase the product and the item has been pre-approved.
 - b. Quote – the option to purchase the product, but the item requires approval.
 - c. Hire – the option to hire the product. The portal then shows you the number of weeks the item is pre-approved for hire.
3. Add to favourites.
4. Add to cart and continue shopping.

Select Product							
SKU	Product Name	Order Type	Pre-Approved	Qty	Favourites	Action	
BEB046050	Community Care Bed - 5 Function	Quote	No	<input type="text" value="1"/>			
H_BEB046050	Community Care Bed - 5 Function	HIRE	20 wks	<input type="text" value="1"/>			

Select Product							
SKU	Product Name	Order Type	Pre-Approved	Qty	Favourites	Action	
BEA007400	Bed/Chair Blocks - 40mm High	Buy	Yes	<input type="text" value="1"/>			
BEA007401	Bed/Chair Blocks - 100mm High	Buy	Yes	<input type="text" value="1"/>			

Attribute Selector is used where the specific products are different only by some attributes such as sizing, see example below:

Select Product			
Compression *	Fitting *	Size *	Generate Product
20-30mmHg ▼	Open Toe ▼	X Small ▼	
SKU	Product Name	Order Type	Quantity
PTS641860	Compress Stockings - GloriaMed - Unisex Knee - 20-30mmHg - Open Toe - X Small - Beige	BUY	1 ★ Add Favourite Prescribe

Purchase / Hire Order

The Purchase / Hire order is a multi-step ordering form, allowing you to order equipment for purchase or hire.

ID 1925	Created Thursday, 19 April 2018
Step 1. My Details	Client Details +
Step 2. Add Prescriber	Add Prescriber +
Step 3. Add Products	Add Products +
Step 4. Supplier & Installer	Supplier & Installer +
Step 5. Clinical Justification	Clinical Justification +
Step 6. Review & Submit	Review & Submit +

Step 1 – Client Details

This is your details; you can check and update them need be.

Step 2 – Add Prescriber

At first, you are presented with your Prescriber Address Book. Your Prescriber Address Book includes all the prescribers you have used to consult with within ETAC before. You can 'search' for a prescriber, 'select' a prescriber or 'Add New Prescriber'.

Step 3 – Products

In this step you will browse or search the product catalogue for the equipment you require to order. For hire items, you will need to add the start and end dates and if the hire period exceeds the pre-approved hire period, the portal will show you a message accordingly.

Step 5 – Clinical Justification

In this step you will need to provide clinical justification for the selected equipment. Clinical justification is only required when the equipment is not pre-approved and a quote is required.

Step 6 – Review & Submit

The final step of the order process. This is your last chance to review and make changes to correct your order before submitting.

Home Mods Order

The Home Modifications Order is a multi-step ordering form, allowing you to order equipment and adding home modification drawing and labour requirements.

ID 1925	Created Thursday, 19 April 2018
Step 1. My Details	Client Details +
Step 2. Add Prescriber	Add Prescriber +
Step 3. Add Products	Add Products +
Step 4. Supplier & Installer	Supplier & Installer +
Step 5. Home Modifications	Home Modifications +
Step 6. Clinical Justification	Clinical Justification +
Step 7. Review & Submit	Review & Submit +

In the Home Mods Order, you are also able to select a supplier / installer and use our Built-in Home Modification Drawing Tool. Please refer to the Purchase / Hire Order section in these instructions for the other steps.

Step 4 – Supplier & Installer

In this step you will choose your preferred supplier & installer, whether be our branches or a network partner you would like to nominate.

Step 5 - Home Modifications

1. Open a Template.....1.
2. Use the Drawing Tool to modify a template.....2.
3. Alternatively, you may use a program of your choice to create your recommended drawings and upload it as an image from files saved on your computer.....3.
4. Upload other files relevant to your order e.g. reports, drawings, own pro-forma, ATI forms.....5.
5. Click **Save**6.
6. Saved fill will be shown here.....7.

The screenshot shows the 'Step 4: Home Modifications' section of the form. The 'Home Modifications' step is active, and the 'Add Home Drawing Modifications to order' button is highlighted with a red circle and the number 1. Below this button is a toolbar with 'Open Template', 'Upload Images', 'Add Description', and 'Upload Files' buttons, with 'Open Template' circled in red and labeled 3. The 'Upload Images' button is circled in red and labeled 4. The 'Add Description' button is circled in red and labeled 5. The 'Upload Files' button is circled in red and labeled 5. Below the toolbar is a drawing tool interface with a toolbar on the left containing various drawing tools, with the 'Open Template' button circled in red and labeled 2. The drawing area is empty, and the 'Save' button is circled in red and labeled 6. The 'Current Draft & Versions' section is circled in red and labeled 7.

Repair Request

The Repair Request is a multi-step ordering form, allowing you to request of a repair of different products.

The screenshot shows the top navigation bar of the Repair Request form. It includes the ID '1925' and the creation date 'Thursday, 19 April 2018'. On the left, there are four steps: 'Step 1. My Details', 'Step 2. Add Prescriber', 'Step 3. Product(s) Requiring Service' (highlighted with a red box), and 'Step 4. Review & Submit'. On the right, there are four sections: 'Client Details', 'Add Prescriber', 'Product(s) Requiring Service' (highlighted with a red box), and 'Review & Submit'. Each section has a plus sign icon to its right.

The main step is 'Products Requiring Service' while the other steps are the same as with the Purchase / Hire Order process. Please refer to the Purchase / Hire Order section in these instructions for the other steps.

Products Requiring Service step

You will need to select the most appropriate products from the list (you can select several products), or enter the details of another product if it is not on the list. You then need to describe the problem and click next to review and submit the request.

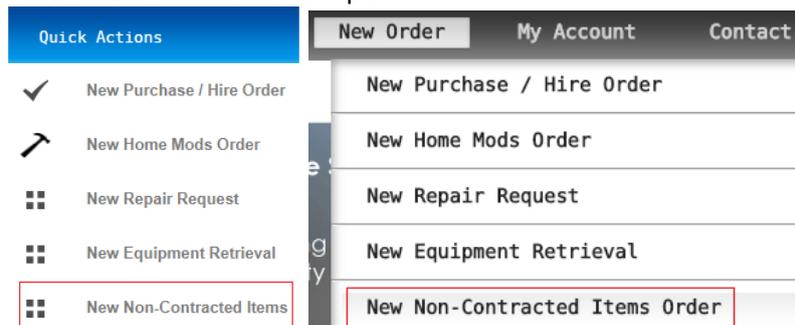
The screenshot shows the 'Product(s) Requiring Service' step of the form. It has a blue header with the title 'Product(s) Requiring Service' and a minus sign icon. Below the header is a grey box with the instruction 'Please indicate the products requiring service'. This is followed by a list of products, each with a checkbox: 'Electric hospital bed', 'Power recline/lift chair', 'Electric standing hoist', 'Electric ceiling hoist', 'Electric scooter', 'Motorised wheelchair', 'Manual wheelchair', 'Tilt in space manual wheelchair', 'Shower transporter/commode', 'Alternating air pressure mattress', 'Alternating air pressure mattress cushion', 'Feed pump', 'Ventilators & Suction machine', 'Nebulizer', 'Tilt table', and 'Wheeled Walking Aid'. Below the list is a red-bordered box containing an 'Other Product(s)' label and a text input field with the placeholder 'Enter other products requiring service'. Below this is another red-bordered box with the label 'Describe the problem' and a text input field with the placeholder 'Enter the problem details here'. At the bottom right, there are three buttons: 'Exit', 'Save', and '<< Prev or Next Step >>'.

Non-Contracted Item Quotes & Orders

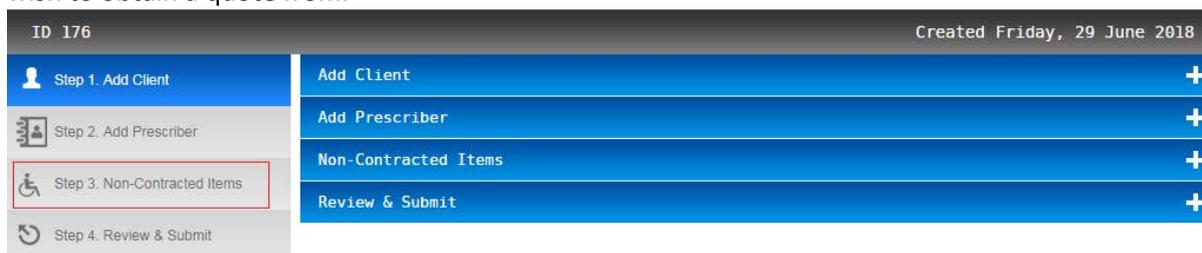
The Non-Contracted Item Quotes & Orders process allows you the client to order those one-off equipment requests of non-contracted item via the portal, receive a quote from Aidacare and submit to TAC Claim staff for approval; all in a seamless way:

1. You will raise a request.
2. Aidacare Customer Service will submit a quote on the portal.
3. TAC Staff will receive an approval email with the quote as attachment.
4. TAC Staff will be able to accept or reject the order and you will be able to accept or reject.
5. If accepted, we will continue with the delivering of the equipment.

Step 1 – Click on ‘New Non-Contracted Items Order’ from the Quick Actions on the left bar or the ‘New Order’ menu on the top bar:



Step 2 – Order form is opened, similar to all other order forms, where you are asked to select the client, select the therapist (optional), and enter the information about the Non-Contracted Item you wish to obtain a quote from.

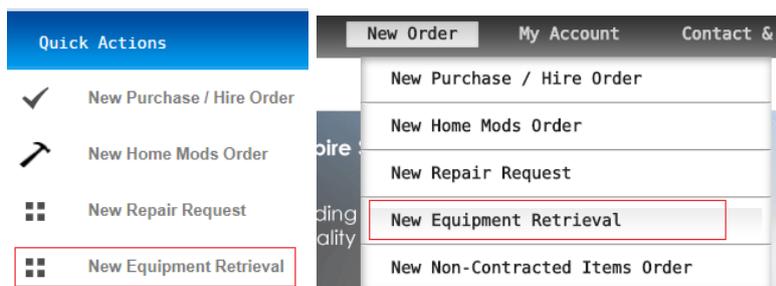


Once we receive the request, you will also receive an approval email with the quote for your perusal.

Equipment Retrieval & Relocation Request

The Equipment Retrieval & Relocation Request Repair Request is a multi-step ordering form, very similar to Repair Request form and other ordering form.

Step 1 – Click on ‘New Equipment Retrieval’ from the Quick Actions on the left bar or the ‘New Order’ menu on the top bar:



Step 2 – Order form is opened, similar to all other order forms, where you are asked to select the client, select the therapist (optional), and enter the information about the Equipment Retrieval. In

that section, you would be able to choose 'Relocation' and enter the new address and contact person details for us to use for the delivery:

ID 176	Created Friday, 29 June 2018
Step 1. Add Client	Add Client +
Step 2. Add Prescriber	Add Prescriber +
Step 3. Equipment Retrieval	Equipment Retrieval +
Step 4. Review & Submit	Review & Submit +

Once we receive the request, you will also receive a confirmation email as well as a complete request email.

Dashboards

The Dashboard is your destination if you want to:

1. Edit a draft order.
2. Check order status.
3. Review order history.
4. End the hire of a specific order.
5. View notices from Aidacare.

My Open Orders	
My Completed Orders	
ALL Client Orders	+
Notices	+

IMPORTANT: you are able to see all orders you are part of. Those can be orders that you raised but also orders that the Prescriber or the TAC Claim Staff included you as a client.

Edit draft order

Locate your order in the My Open Orders and click 'EDIT'

My Open Orders								
ID	Date	Client Name	Claim No	Accident Date	Created By	Status	Type	Details
63	12/04/2018	Hawk Ethan	TAC88876	04/02/2017	TAC	Draft	Home Mods	EDIT

Check Order Status

Against each order, you can see the order status; and when you view the order, you will be able to see the line status.

My Open Hire Orders

This section is a sub-section of My Open Orders and specifically includes only Open Hire orders for quick access in case you want to end or extend the hire.

Ending Hire

To end a hire of a specific piece of equipment, you need to follow the following steps:

1. Locate the order under 'My Open Hire Orders'.
2. Click on action: "End Hire" and review the order details to confirm that is indeed the order you want to end the hire of.
3. Click on End Hire, choose the item you want to return and add pickup instructions for our drivers to pick up the item from the correct location.

The order status will remain as Open Hire but the line status will change to Request Pickup. At this point, our Customer Service team will stop the billing and continue with organising the collection of the equipment based on the instruction.

My Account

This section allows you to manage your details, your default supplier, your default installeryou're your Prescriber Address Book. Hover your mouse over the "My Account" option in the horizontal menu for the drop down options to appear.

The screenshots show the 'My Account' menu with 'My Details', 'My Supplier', 'My Installer', 'My Prescribers', and 'My Password' options. The 'Account Details' section shows personal information for Welly Khouw, including phone, email, and claim numbers. The 'Default Supplier' section shows detailed information for Aidacare - Melbourne, including contact name Michelle De'Almeida. The 'Default Installer' section shows detailed information for Aidacare - Sydney South, including contact name Sharon Warden (Admin) or Sandra. The 'My Prescriber Address Book' section shows a table of prescribers with columns for Name, Address, Phone, Discipline, Employer, and Edit/View.

Name	Address	Phone	Discipline	Employer	Edit/View
V					
Varakala, Ashwini	34 noonan rdd, Ingleburnn, ACT, 2566	0983 555 222	Occupational Therapist	Test666	Edit/View

Contact Us & Online Support

Contact us details can be found under the mega menu 'Contact & Help'. You can also find this user guide in the same section on the portal.

Online help is also available by clicking on the Online Help icon on the left panel of each page.