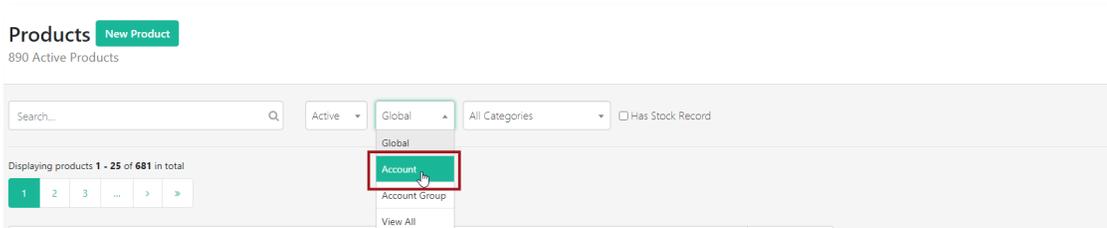# OVERVIEW OF RENTAL PROCESS IN MOTIONMD®

This document will review the updates and enhancements that have been made to Rental Products and Rental Processes in MotionMD to make the Rental Process more user friendly. This document contains the following sections:

1. Making an Existing Product Rentable
2. Adding a New Rental Product
3. Rental Products List Page Overview
4. Rental Product Page Overview
5. Dispensing a Rental Product Manually
6. Dispensing a Rental Product from a Patient Agreement
7. Dispensing a Rental Product from a Patient Agreement using a Protocol
8. Dispensing a Rental Product on a Patient Agreement from the Rental Products tab
9. Completing the Rental Cycle
10. Servicing a Rental Product
11. Inactivating a Rental Product
12. Additional Information

Prior to adding a New Rental Product, a Product and Inventory Item must be created. Follow the training document for creating new Products and Inventory Items. Once those steps are completed add Stock Records for each Inventory Location Rental Products will be dispensed from and set Par Level to Zero and On-hand to 1,000.

1. To Make an Existing Product Rentable

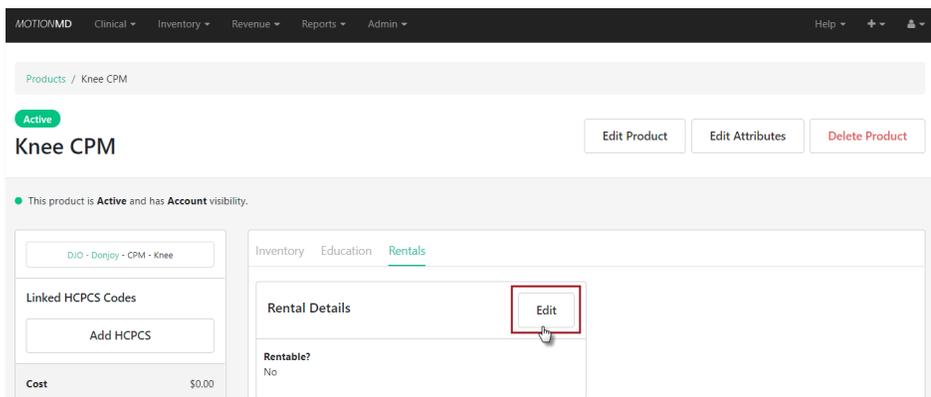On the **Product** page, filter to **Account** and select the product.

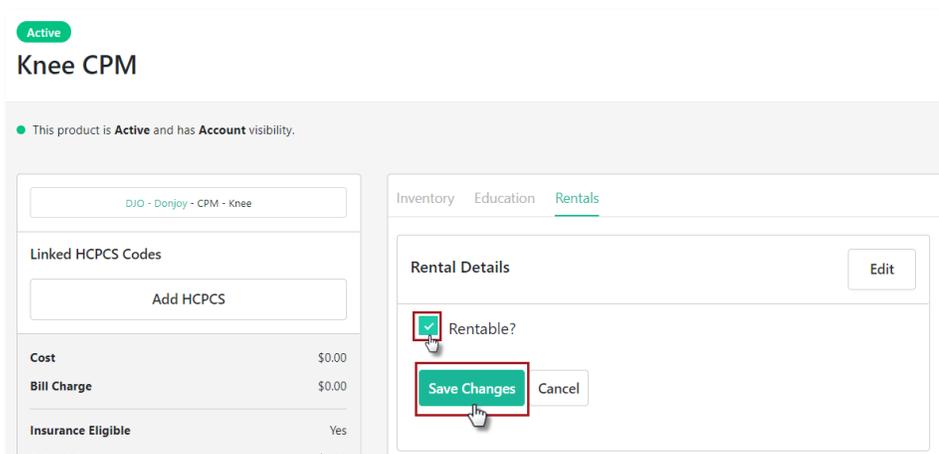Once on the Product select the **Rentals** tab.
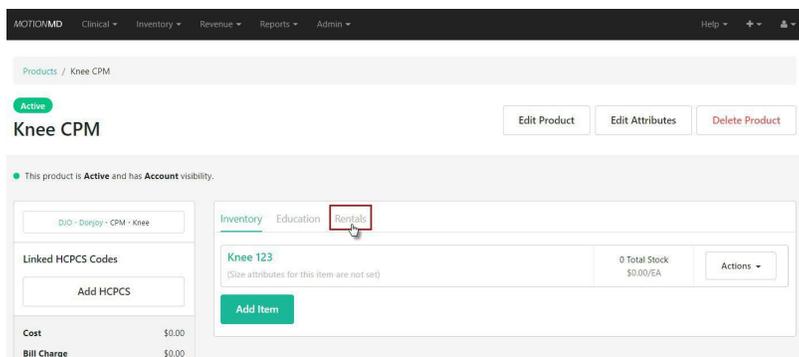
Overview of Rental Process in MotionMD®

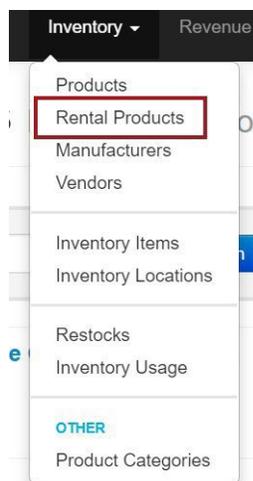On **Rental Details**, click the **Edit** button

Check the **Rentable?** checkbox and click **Save Changes**. Checking Rentable allows this Product to be created as a Rental Product.
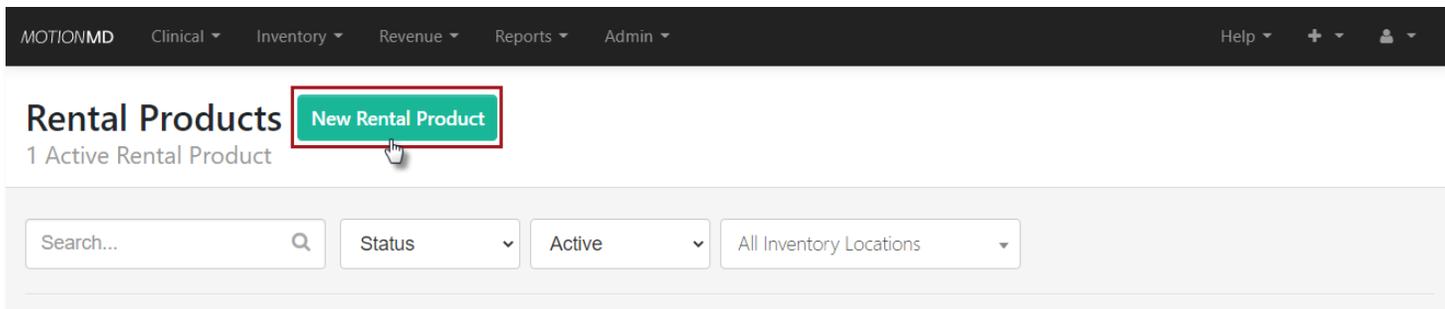

2. Adding a New Rental Product

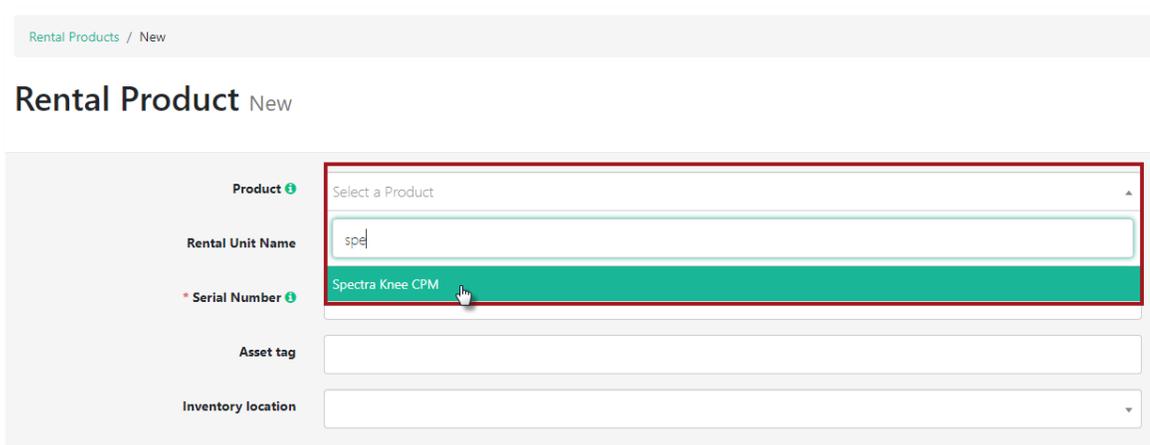From the **Inventory tab**, select the **Rental Products** option
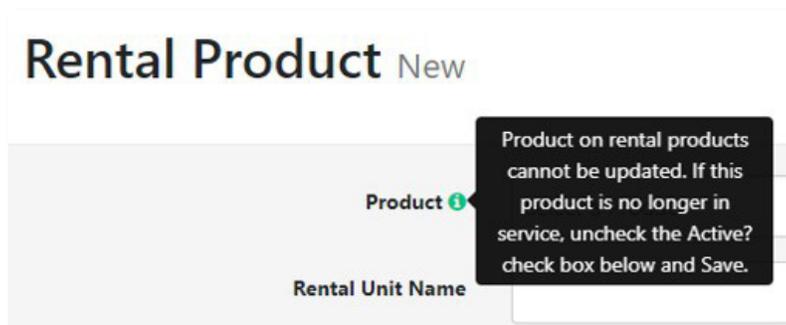
OVERVIEW OF RENTAL PROCESS IN MOTIONMD®

This brings you to the **Rental Products list** page, to add a new Rental Product, click the **New Rental Product** button

Search for and Select the Product to be Rented.

Product Tooltip:

Enter the **Serial Number** of the Product and select the **Inventory Location** coinciding with a location the Stock Record was created for. These two fields are mandatory. Click the **Create Rental Product** button.

Serial Number Tooltip:

A message will show at the top of the page that the Rental Product was successfully created. Click the **Rental Products** link.

OVERVIEW OF RENTAL PROCESS IN MOTIONMD®

The new newly created rental product will show up on the Rental Products List page and is Available for rental.
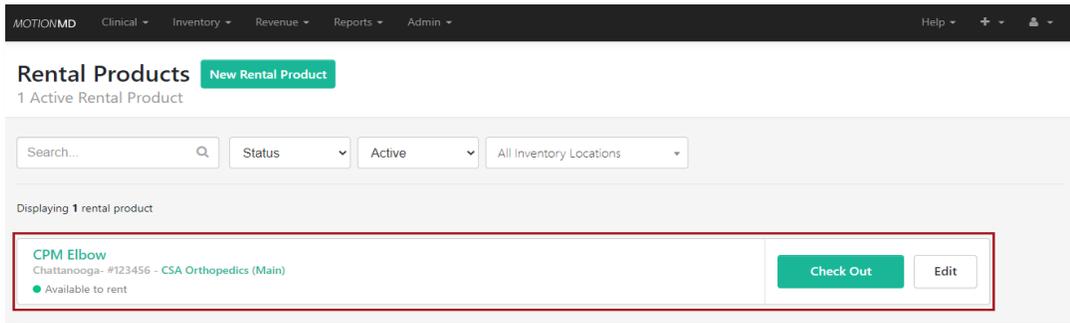
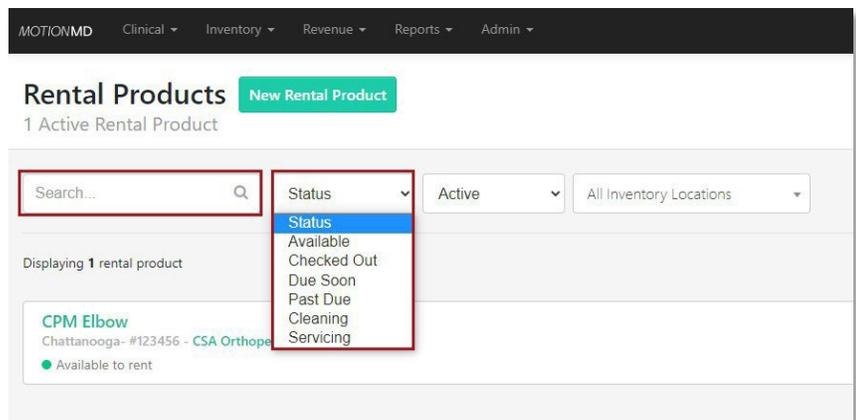## 3. Rental Products List Page Overview

The **Rental Products List** page shows all Active Rental Products and has Search and Filter capabilities along with color coding notifications

**Search** box will work using full or partial Product Name or Serial Number

Status dropdown allows filtering the Rental list by any Status option

Active filter is defaulted and can be changed to filter to Inactive units

Inventory Locations filter is defaulted to All Inventory Locations. The dropdown allows filtering to a specific location

Color coding will highlight Rental Products that are Available, Currently Rented, Due Soon and Past Due. The Status of the Rental Product can be updated from this page by clicking the button on the row.
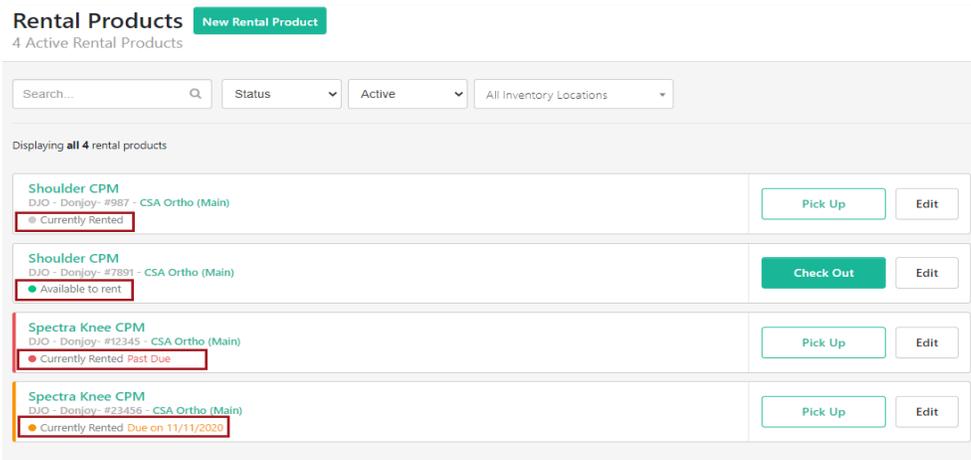
4.   Rental Product Page Overview

The **Rental Product** page shows the current and historical rental cycles for that particular unit (serial number).

The top section shows the current rental cycle and its status. Directly below is a list of all **Previous Rental Cycles** that will clearly indicate whether the unit was manually dispensed or dispensed from a Patient Agreement (see next two sections). The Status can be updated from this page by clicking the button in the current cycle section at the top.

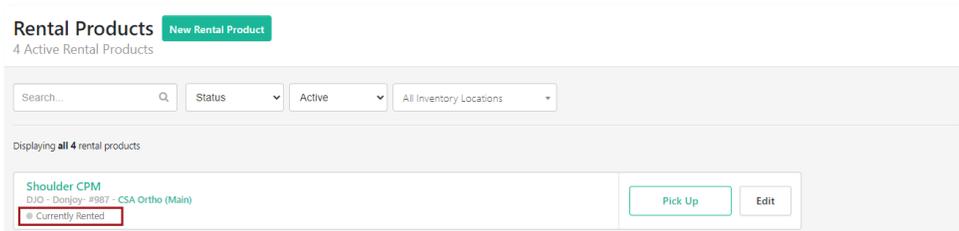## 5.   Manually Dispensing a Rental Product

Use this process if Patient Agreements in MotionMD are not going to be used as AOBs for the Rental Products.

From the **Rental Products list** page, find the product matching the serial number being dispensed and click the **Check Out** button or click into the **Rental Product** and click the **Check Out** button. A popup box will appear, enter the **number of days** the unit is being rented, this is a mandatory field, and click **Submit** button.
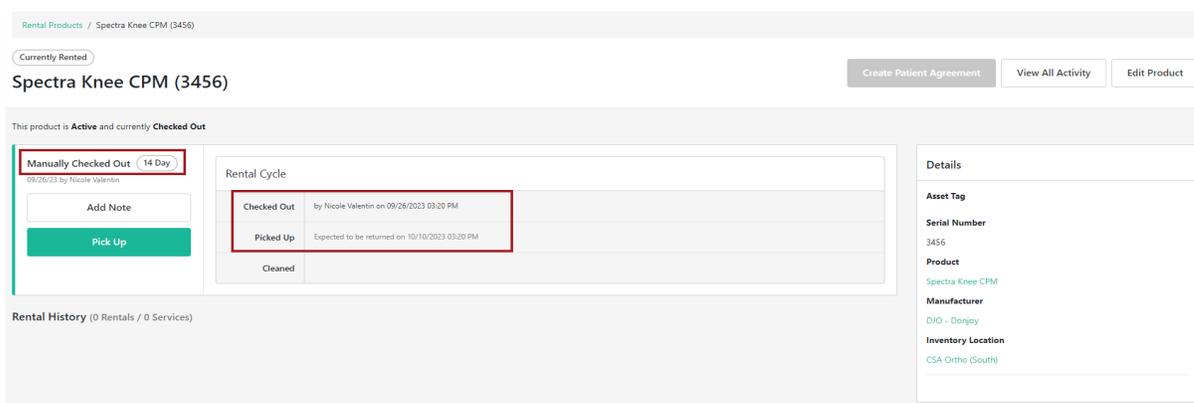
OVERVIEW OF RENTAL PROCESS IN MOTIONMD®

The **Rental Product** will show as **Currently Rented** on the list page.

Within the **Rental Product** page, it shows the unit was manually checked out and the number of days of the rental period. The **Checked-Out** user and date and **Expected Pick Up** date are listed under the **Rental Cycle** section.
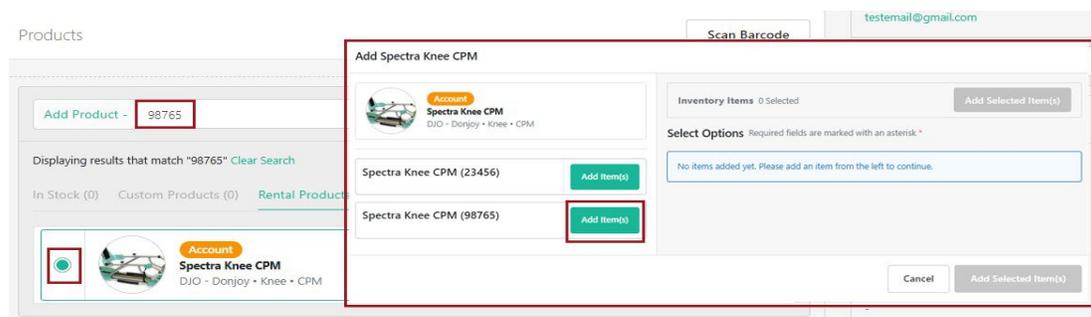

6. Dispensing a Rental Product from a Patient Agreement

To create a **Patient Agreement** for patient being dispensed a Rental Product ensure the Patient Agreement is created within the Clinic Location the Rental Product was created under.

On the **Products** section on the Patient Agreement the Rental Product can be searched by the **Product Name** or **Serial Number.**

If searching by **Name**, all Serial Numbers created under that product will be listed under a new **Rental Product**s tab and the availability of each Serial Number is indicated.

If searching by **Serial Number**, only a product created matching that serial number will be displayed. Partial Serial Number searches will also bring back results.

Dispensing a Rental Product from a Patient Agreement Cont.

Click the **Add Item(s)** button for the serial item being dispensed and complete the product form by adding **Involved Side**, **Rental Period Dates** (both mandatory fields) then click **Add Selected Item(s)**.

Note, the Serial Number field cannot be altered, if this is not the correct serial number, click Cancel and search for the correct serial number.

The Product displayed on the Patient Agreement will indicate the Rental Period and the Serial Number dispensed. Clicking the View Rental Product link will take you to that Rental Products page.

As soon as the **Patient signs** the Patient Agreement, the Rental Product will change to **Checked Out.**
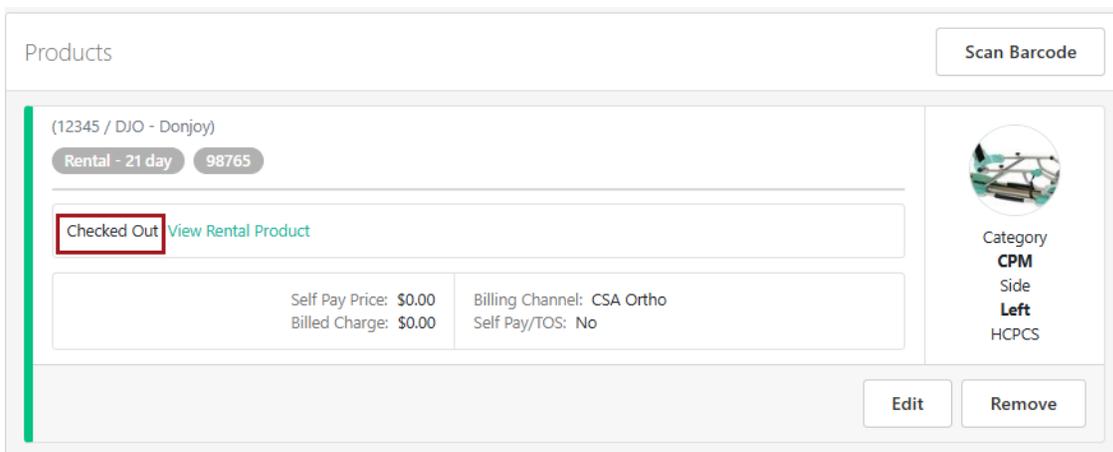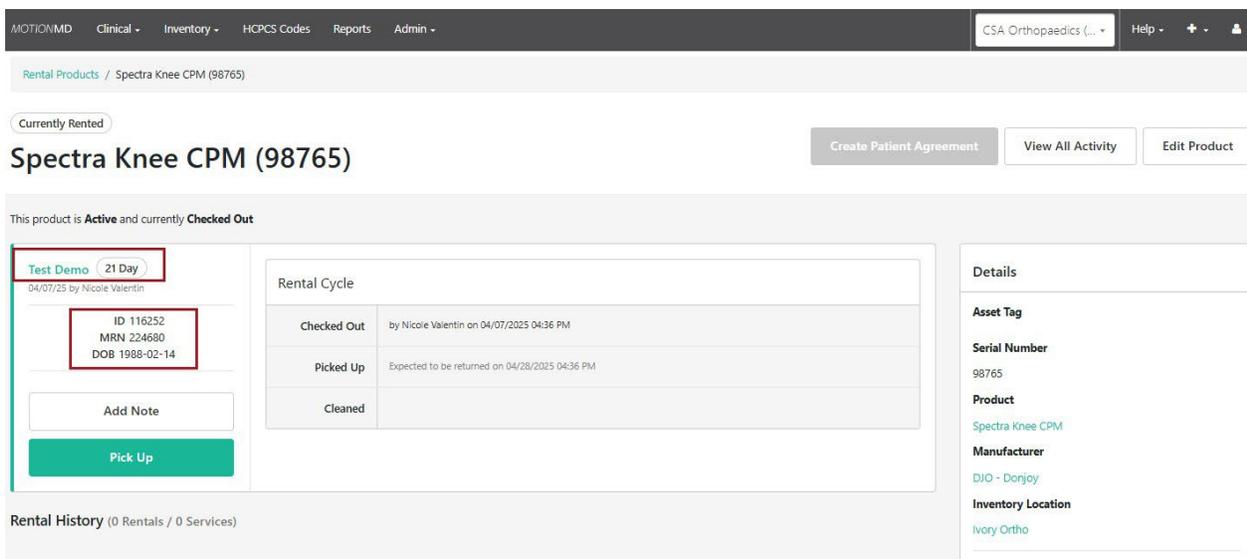

Hovering over the tooltip will provide details on the rental product's current status, not necessarily it's stats on the PA.
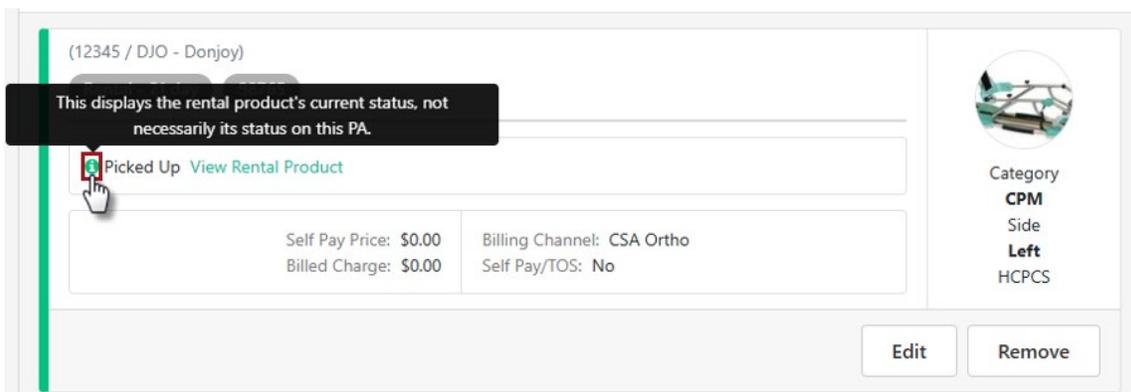
Navigating to that Rental Products page will show the unit as **Currently Rented/Checked Out** and the **Rental Cycle** will indicate the Patient it's currently rented to, the Rental Period in Days, PA number, MRN (if added) and Patient DOB.

7. Dispensing a Rental Product on a Patient Agreement using Provider Protocol

Create a **Patient Agreement** for patient being dispensed a Rental Product using **Provider Protocol**. Ensure the Patient Agreement is created within the Clinic Location the Rental Product was created under.

Select the Provider from the drop-down menu and **Use Protocol** > **Choose Protocol > Select Serial Number.**

Once the PA is created, the Rental Product selected on the Protocol will auto-populate. The user will need to add **Involved Side**, **Rental Period Dates** (both mandatory fields) then click **Save Changes**.

8. **Dispensing a Rental Product on a Patient Agreement from the Rental Products tab**

On **Rental Products**, select the Rental Product and **Serial Number** for the Rental item dispensed. In the Rental Product select **Create Patient Agreement.**
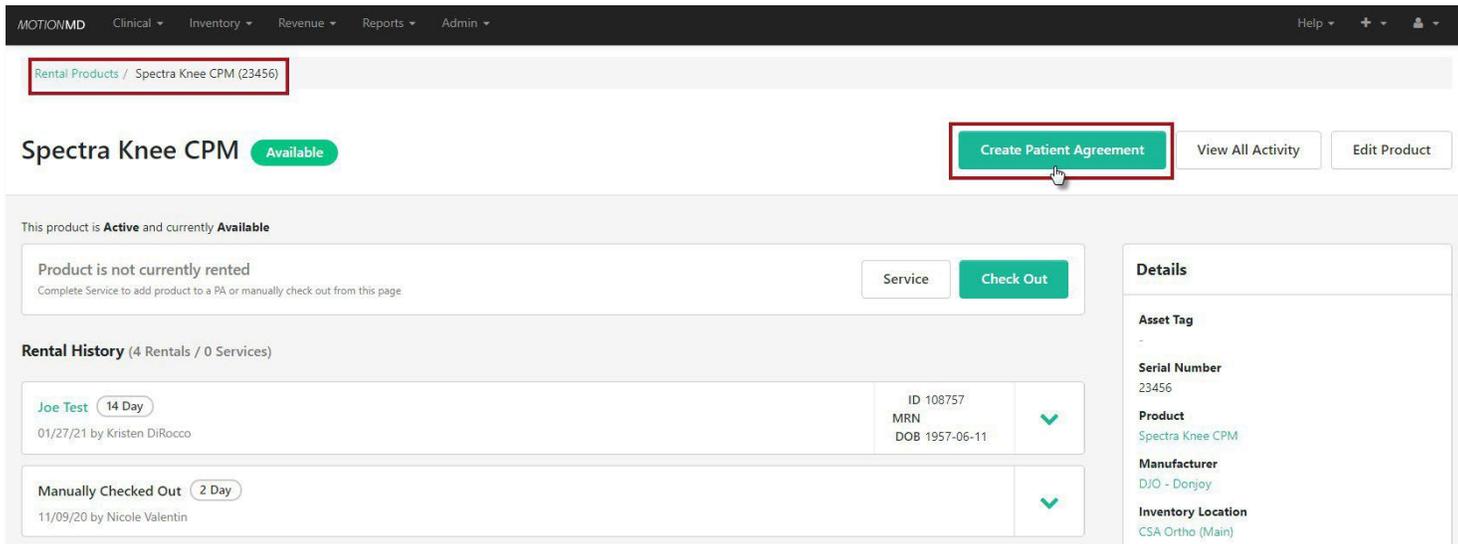

Once the PA is created, the Rental Product selected on the Protocol will auto-populate. The user will need to add **Involved Side**, **Rental Period Dates** (both mandatory fields) then click **Save Changes**.

9. **Completing the Rental Cycle Process**

Whether the unit was Manually Checked Out or Checked Out from a Patient Agreement the remaining steps to complete the Rental Cycle are the same and can be completed from the List page or within the Rental Product page.

After a unit is **Checked Out**, the next status is **Pick Up**. When the unit has been picked up or returned, click the e**Picked Up** button.
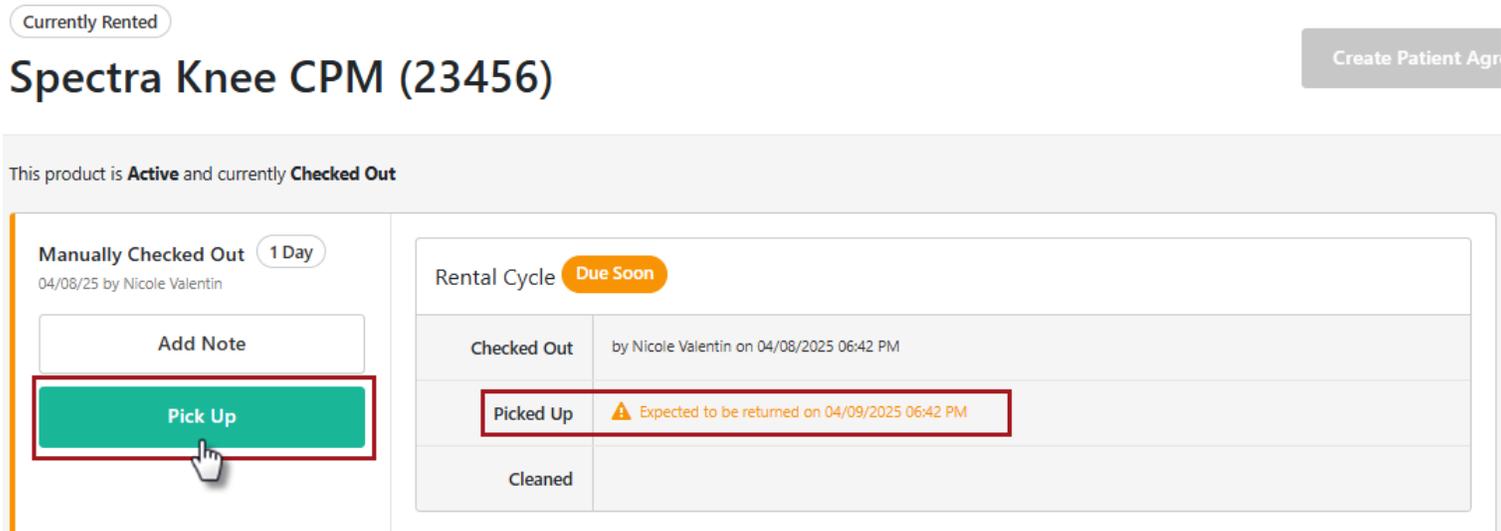
The next status is **Clean**, which indicates the unit is ready to be cleaned after use. You will also see the Picked-Up section has updated with the Date and User who selected the Picked Up button. When unit is ready to be cleaned, click the **Clean** button.

The next status is **Check In**. You will now see the Date and User who clicked the Clean button. Once the unit has been cleaned and is ready to be rented, click the **Check In** button. Until the Check In button is clicked, this unit cannot be checked out for a new rental cycle or added to a Patient Agreement.

After the **Check In** button is clicked, the unit will show as **Available** and ready for **Check Out**. The rental that was just Checked In will show at the top of the list under Previous Rental Cycles.

10. Servicing a Rental Product

If a Rental Product needs to be Serviced (repaired), the unit can be set to an in **Service** status on the Rental Product page. Note, the Service button will only be displayed if the unit is in the Available status. From the Rental Product page, click the **Service** button.

The status will update to Active and currently In Service. When servicing has been completed, click the **Complete Service** button to update the unit's status to Available.

While in the product is in service, select **Add Service Note** to record details.
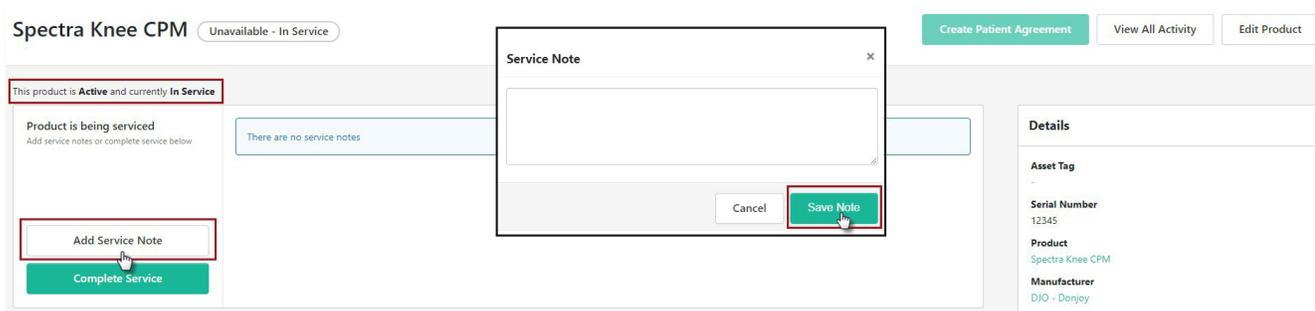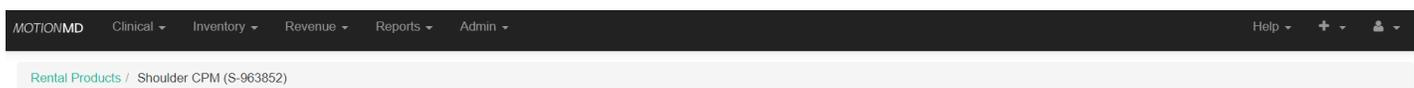

The **Serviced** and **Completed Service** statuses will show on the **All Activity** page and include the User and Dates it was updated
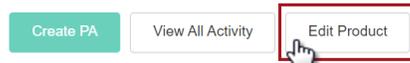

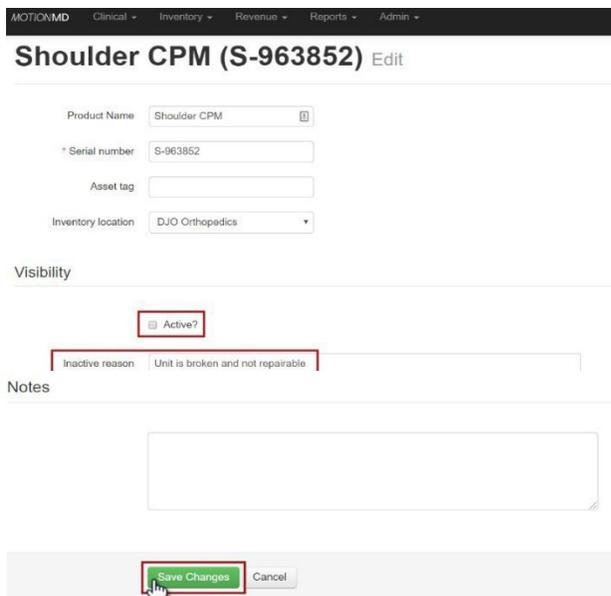## 11. Inactivating a Rental Product

If a rental unit is no longer available for rental, it can be set to Inactive. This will remove the unit from the Rental Product list page. Click the **Edit Product** button.
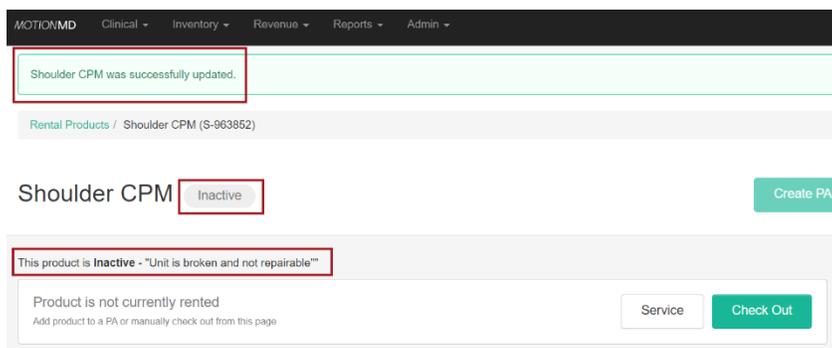

On the **Edit** page, **uncheck the Active?** box, add an **Inactive Reason** (mandatory field) and click **Save Changes** button
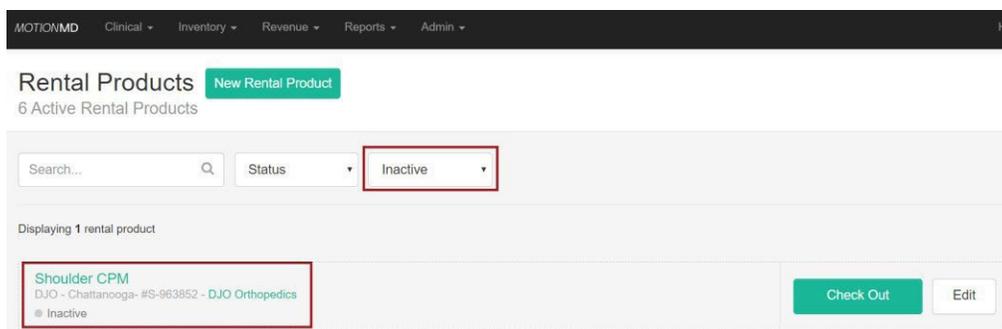
OVERVIEW OF RENTAL PROCESS IN MOTIONMD®

A **Success** message will display at the top of the Rental Product page, the unit will show it's Inactive and the reason the unit is inactive will be displayed

From the Rental Products list page, setting the filter to Inactive will display all Inactive units

12. Additional Information

Historical Rental Data

All rental transaction details (status update) that were completed in the system prior to these enhancements can be found within the Rental Product page by clicking the **View All Activity** button.

The **All Activity** page will show all historical details and each status change completed prior to the new enhancements.

New rental cycle details will continue to be added to the All Activity page, but also show as individual cycles on the main Rental Product page for better clarity
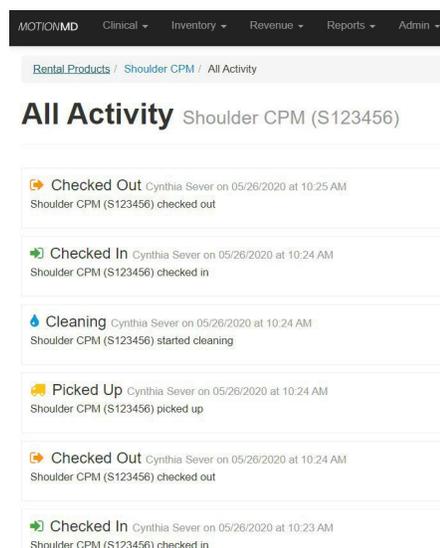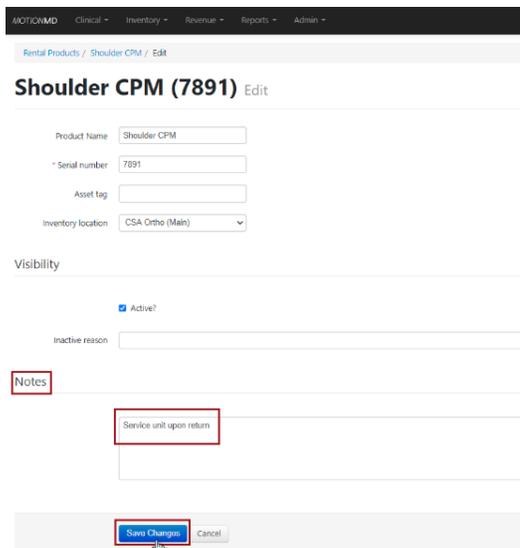
OVERVIEW OF RENTAL PROCESS IN MOTIONMD®

Adding Notes to a Rental Product

Notes specific to that unit can be added when creating a new Rental Product or by clicking the **Edit Product** button on the Rental Product page.

On **Edit** page, under the **Notes** section, type in and specific details Click

Save Changes button

Added notes will show under the Details section on the Rental Product page and in line on the Rental Product List page.