SCRIPT FOR LOANING AN ITEM(S)

1. Click POS tab
2. Enter resident's name in yellow SEARCH, box click SEARCH (note 1)
    a. If the person is not found, click ADD NEW CONTACT button
    b. See script below for that process
3. SELECT the person from search matches
4. SELECT the LOAN tab
5. Take the person to the equipment storage area, and select the specific item(s) to borrow
6. Click the drop-down box for category of the (first) item borrowed
7. Click the specific item number being borrowed
8. Enter the quantity as 1
9. Enter "Due mm/dd/yyyy" in the NOTE field where that date is 6 weeks from today
10. Repeat steps 6, 7 and 8 for any additional loan items
11. Press UPDATE CART
12. *Note that items can be added individually using steps 6, 7, 8, 9 and 11 for each one*
13. To remove an item <u>before</u> the Receipt is SAVED
    a. Click the red "X" on the item to be removed
    b. Click UPDATE CART
14. Click SAVE when all items are entered as desired
15. The receipt for the transaction is displayed
16. If the borrower (person who is present) is NOT the resident (listed in step 2)
    a. Enter the borrower's name and phone number in the Notes field
    b. Click UPDATE NOTE (required to save that information !)
    c. Confirm that the NOTE now appears on the Receipt
17. Press PRINT LARGE RECEIPT
18. Press PRINT AND CLOSE
19. Select the alternate printer – NOT the RICOH printer
20. Collect the printed Receipt
21. Have the borrow SIGN the Receipt
22. Scan or copy the signed Receipt (which usage to be determined)
23. If the borrower wishes an email copy to be sent to the resident
    a. Press PRINT LARGE RECEIPT again
    b. Press EMAIL RECEIPT to…
    c. An email confirmation will display
    d. Press CLOSE
24. Give the Receipt and item(s) to borrower
25. Press the main POS tab to exit processing this current transaction (Receipt)

Note 1:

The loan should be placed for the resident who will use the item, even if they are not the person present

SUB-SCRIPT FOR "ADD A NEW CONTACT"

1. Enter required First name, Last name, phone number
   a. Ask if the number is for a Cell phone
   b. if so, select type "CELL", otherwise select type "HOME"
2. Begin to enter their address
   a. Use the shaded "Look Up Address using Google" line
      i. Google will suggest addresses as you type more information
      ii. Google formats the addresses in a standardized way
      iii. Click on the suggestion, which will fill in the address, city state and ZIP fields
   b. Otherwise, key in the address, city state and ZIP
3. Enter an email address – required!

Ignore the Birthdate entry – we do not capture this information