












# EMS Advice Request for Assessors using Pro WorkFlow (PWF)

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### Submitting an EMS Advice Request

## New Project Request

1. After logging in to PWF, click
2. At the top of the Add Project Request screen, click Select a Template...
3. Type in EM and "EMS Advice" will display, press Enter
4. Edit the Title to provide your client's name, e.g. MONDAY Frank,
5. Remove the advice types **not** required, e.g. For Housing Advice, remove "Equipment" and "Vehicles"
6. Scroll down this page to attach all required documents by clicking on the Select files button, click on your files and click the Open button
7. Click the Save button to send your request to ENZ

### Add Project Request

Use Template: EMS Advice 2/3

Teams: Professional Advisors

Staff: - EMS Advice Administrator

4/5 Title: MONDAY Frank, Housing,

Description

Please:

- edit the Title above to provide your client's name, e.g. MONDAY Frank,
- Remove the advice types **not** required, e.g. For Housing Advice, remove "Equipment" and "Vehicles"
- Scroll down this page to attach all required documents by clicking on the Select files button below, click on your files and click the Open button
- click the Save button to send your request to ENZ

Pre 1 Oct Referral: --

Date Started: 24 April 2018


Date Due:

6 Files

Select Files Drag Files Here

<span>monday_plan.pdf</span>	71.7Kb	Delete
<span>monday_request_for_emsadvice.docx</span>	179.2Kb	Delete
<span>monday_sketches.pdf</span>	71.7Kb	Delete

7 Save




**Viewing New Requests**

Clicking on the **Projects Requests** tab, you will be able to see requests you have submitted that have not yet been initially reviewed by Enable New Zealand

Projects Page
Project Archive
Project Requests
New Project Request

External Clients Request (To approve)

Title	Client	Start	Due	Submitted On	Submitted to	Budget	Attachments
MONDAY Frank, Housing,	Ann Assessor	24 Apr 2018	-	24 Apr 2018	EMS Advice Administrator	NZD\$0.00	3 Files



**Viewing Acknowledged Requests**


Once Enable New Zealand has completed the initial review, your request will display in the **Projects Page** tab

- Clicking on the Title (Client name) to display the request details

Projects Page
Project Archive
Project Requests
New Project Request

EMS Advice

No.	Title	Client	Start	Due
MFM8822	MONDAY Frank, Housing, WAS	Tairawhiti DHB	24 Apr 2018	24 Jul 2018



**Viewing Request Details**

Once Enable New Zealand has completed the initial review, your request will display in the Projects tab

1. Clicking on the Title (Client name) to display the request details

You will be able to view:

1. Who the EMS Advisor is (Manager)
2. What Status the request is at:
  - **Awaiting Review** – to be assigned to an EMS Advisor
  - **Under Review** – an EMS Advisor has picked up your request
  - **MOH Review** – has gone to the MOH Review Panel
3. A task called “Comms Task for Assessors”. This can be used for you to contact the EMS Advisor from within the request.
4. Any Messages sent to you. These will also appear in your Outlook mail
5. The Files you attached when submitting the request. You will be able to view any other files attached to this Project Folder and you will be able to add additional files if required.



MONDAY Frank, Housing, WAS MFM8822  
Tairawhiti DHB

**Details**

1 Manager: Allison McNamara  
Category: EMS Advice  
Priority: Medium  
2 Status: Under Review

Start: 24 Apr 2018  
Due: 24 Jul 2018

**Description**

**Tasks**

	Order	Priority	Start Date	Due Date	
3	Comms Task for Assessors MFM8822 MONDAY Frank, Housing, WAS 3	Medium	24 Apr 2018	24 Jul 2018	Expand All

**Messages**

Start new discussion...

4 Allison McNamara: Make First Contact with EMS Assessor MFM8822 MONDAY Frank, Housing, WAS  
To: Ann Assessor  
9:36 Hello Ann, I have left a voicemail for you but thought I would follow up with an email. I have...

Reply to this discussion...

**Contacts**

- Ann Assessor
- Allison McNamara
- EMS Advice Administrator

**More Information**

Pre 1 Oct Referral

**Shared Notes**


**Files** Add File

5 Drag Files Here

Project Folder	
MONDAY_Request_for_EMSSAdvice.docx	179.2Kb 24 Apr 2018
MONDAY_Plan.pdf	71.7Kb 24 Apr 2018
MONDAY_Sketches.pdf	71.7Kb 24 Apr 2018

Comms Task for Assessors MFM8822 MONDAY Frank, Housing, WAS	
Send_a_Message.docx	245.4Kb 24 Apr 2018

Selected: [Download](#)




**Searching**

Q Search...


Using this Search option will search for any character in a request  
Common ones to use would be:

- Name, any part of it; e.g. SON will return Morrison, Nelson, Sonny...
- NHI



Will display:

- Favourite Projects (requests)
- Recent Projects
- Recent Tasks



**Sorting**

**Projects Page tab**

You can sort the order of requests in multiple ways by clicking on any of the headings at the top of the list.

E.g. Clicking on Start will display requests oldest to newest or vice-versa.

Projects


Projects Page

Project Archive

Project Requests

New Project Request

EMS Advice					
No.	Title	Client	Start	Due	Project Manager
BLB8744	BOURNE Lisa, Equipment, Bed	Tairawhiti DHB	Start <small>Click to sort</small>	23 Jul 2018	Helen Bourne
BTB3020	BROWN Tina, Equipment, W/Chr P/Chr	Tairawhiti DHB	23 Apr 2018	23 Jul 2018	EMS Advice Administrator
EGE1010	EDENS Gail, Equipment, w/chr	Tairawhiti DHB	23 Apr 2018	23 Jul 2018	Elizabeth Edens



**Sending Messages (emails)**

1. Click the title of your task
2. Click the Messages tab and click Add Message
3. Record your message in the white area below the heading
4. Tick the box next to the name of the person you are sending this Message to
5. If you wish to attach a document, click Select Files
  - a. Click on the file to attach
  - b. Click Open
6. Click Send

1

Comms Task for Assessors MFM8822 MONDAY Frank, Housing, WAS

Medium

24 Apr 2018

24 Jul 2018

Info

Time

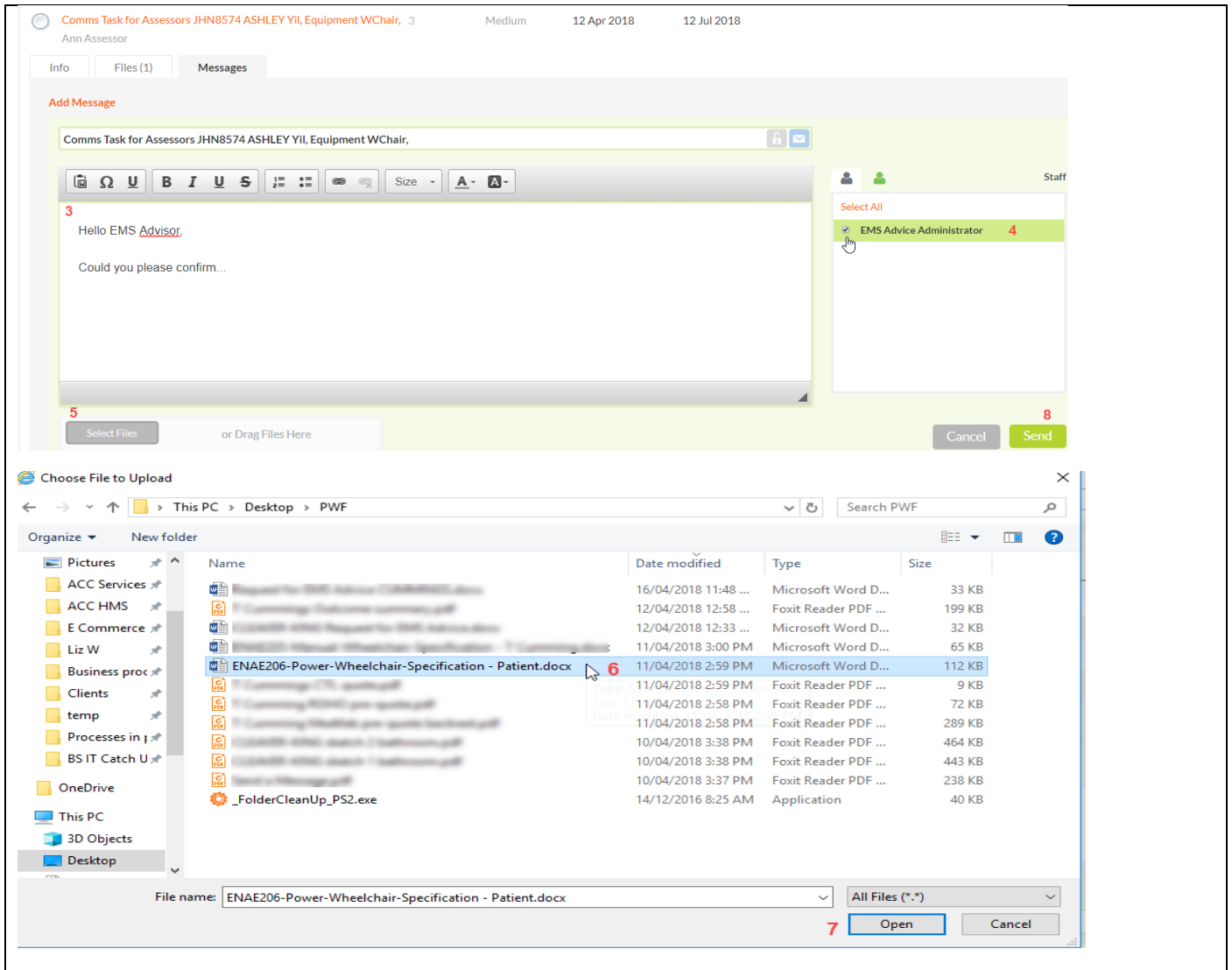
Files (1)

Messages 2

Add Message 3

No messages added yet

5 | Page





### Receiving Messages (emails)

Replying to a Message can be done either via:

- the Message received via your email program (Outlook) or
- by replying within the PWF Request. Go to the Message and start typing in the “Reply to this discussion...” area

Either way the reply email will save against the PWF Request.

Where there are files attached, they will display as a link rather than the normal email attachments. Click on the link to open the attachment.

Reply Reply All Forward IM



Tue 24/04/2018 11:18 AM

reply@notify.proworkflow.com

Send Outcome Summary to EMS Assessor MFM8822 MONDAY Frank, Housing, WAS

To Ann Assessor

If there are problems with how this message is displayed, click here to view it in a web browser.

Write ABOVE THIS LINE to reply  
(Messages larger than 10 Mb WILL NOT BE uploaded)

Allison McNamara sent you a message



To: Ann Assessor

Project [MFM8822 - MONDAY Frank, Housing, WAS](#)

Task 8 - Send Outcome Summary to EMS Assessor MFM8822 MONDAY Frank, Housing, WAS

Hello,

Please click on the link below to view the Outcome Summary for your client.

[MONDAY\\_Request\\_for\\_EMSAdvice\\_OUTCOME\\_SUMMARY1.pdf](#)

Allison McNamara  
Enable New Zealand FMS Advisor

 **Reply to Messages**

The "To" address will look like this. It means it is replying back to the request in PWF.


 Send	From ▾	Liz.Webster@enable.co.nz
	To...	<input type="checkbox"/> p_107RKRUUBULDDXY961MDLLCP3JT7QL1EZ4PPMTM5ONGA4M2@notify.proworkflow.com
	Cc...	
	Subject	RE: Send Outcome Summary to EMS Assessor MFM8822 MONDAY Frank, Housing, WAS

Enter your reply here

**From:** reply@notify.proworkflow.com <reply@notify.proworkflow.com>  
**Sent:** Tuesday, 24 April 2018 11:18 AM  
**To:** Allison McNamara  
**Subject:** Send Outcome Summary to EMS Assessor MFM8822 MONDAY Frank, Housing, WAS

-----  
Write ABOVE THIS LINE to reply  
(Messages larger than 10 Mb WILL NOT BE upl

Allison McNamara sent you a message




**To: Ann Assessor**

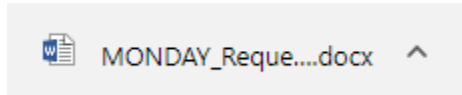
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Project [MFM8822 - MONDAY Frank, Housing, WAS](#)

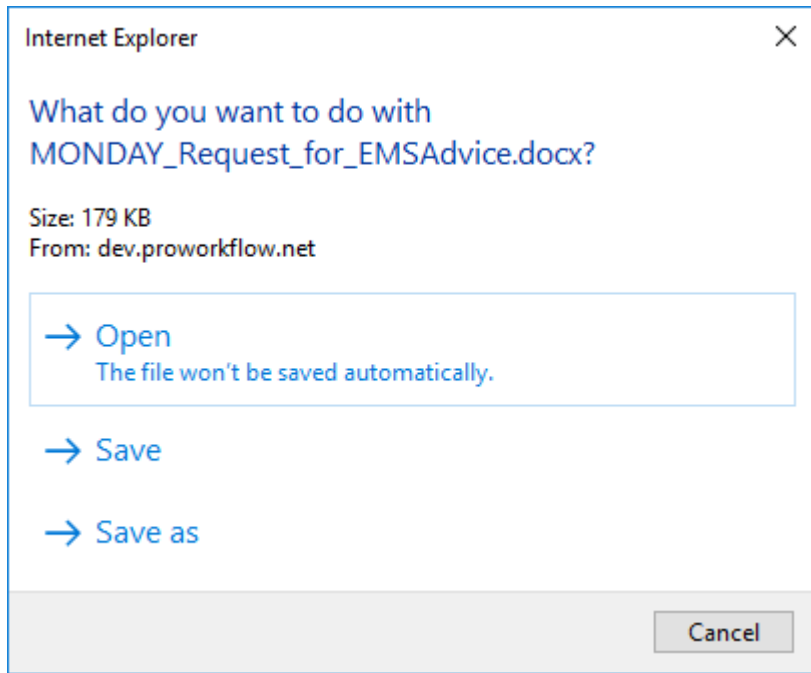



 <b>Viewing Files/Documents</b>	<ol style="list-style-type: none"><li>1. From the Projects Page tab, click on the Title name to display the request details</li><li>2. Scroll down the page to the Files section</li><li>3. Click on the document title you wish to open</li></ol> <p>Depending on the document type you may get one of these screens below display.</p>
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This may display at the bottom left of your screen. Click on it for the Word document to open.



Or this may display in the middle of your screen. Click on Open to display the document.



 <b>Adding Files/Documents</b>	<ol style="list-style-type: none"><li>1. From the Projects Page tab, click on the Title name to display the request details</li><li>2. Scroll down the page to the Files section</li><li>3. Click on Add File</li><li>4. Click on the file to attach</li><li>5. Click Open</li><li>6. Click <b>Upload</b></li></ol>
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