

aSAP How to Guide

How to Search and Create a New Customer

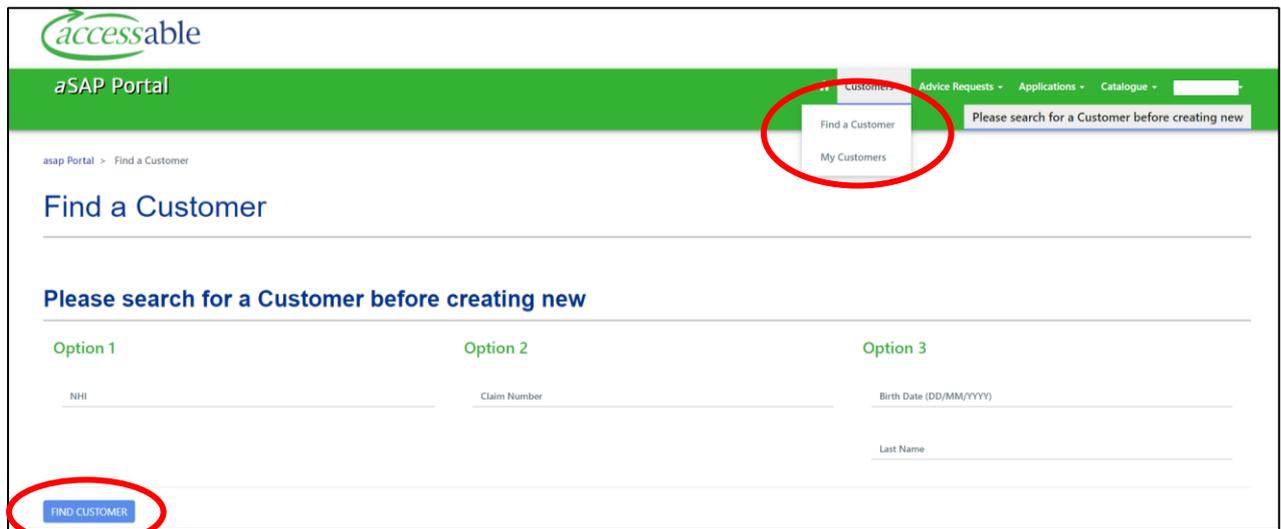
aSAP is a customer-focused platform, this resource provides an in-depth information to help health professionals and health assistants to locate existing Customers or Create New Customer.

- If you are notified that the Customer is not found in aSAP, you will need to allow additional time – this information will be used for all future requests by health professionals and health assistants accessing funding and services for this Customer.
- It is important to ensure that this is completed correctly and saved before you start to build an application in the aSAP Portal.
- Please refer to the **aSAP MoH New Customer Profile Compulsory Requirements** as this provides a handy checklist before starting.

Searching and finding an Existing Customer:

Click on the Customer tab and select ‘find a customer’ in the green ribbon. Select either Search Option One (NHI Number) or Option Three (Customer’s date of birth **and** last name).

Click on the blue ‘Find Customer’ button and existing aSAP customers that match your search will be displayed. You can then identify and select your Customer from this list.



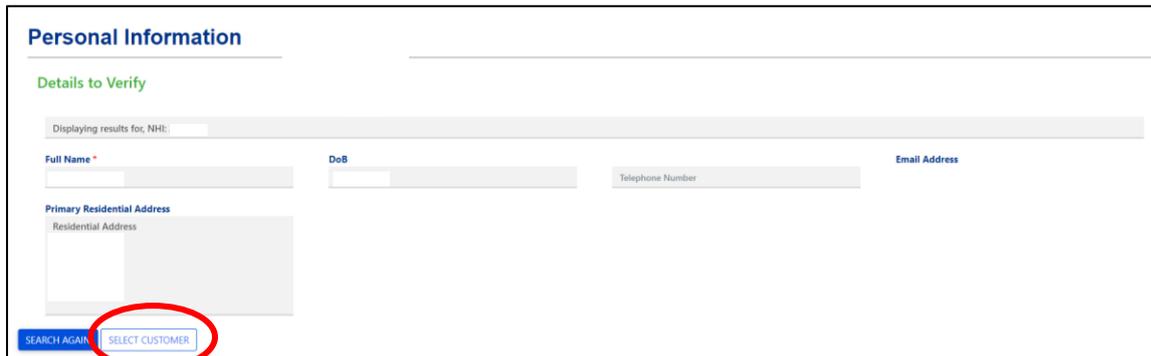
The screenshot shows the aSAP Portal interface for finding a customer. The header is green with the 'accessible' logo and 'aSAP Portal' text. A navigation menu includes 'Home', 'Advice Requests', 'Applications', and 'Catalogue'. A dropdown menu is open, showing 'Find a Customer' (circled in red) and 'My Customers'. Below the header, the page title is 'Find a Customer' and the instruction is 'Please search for a Customer before creating new'. There are three search options: Option 1 (NHI), Option 2 (Claim Number), and Option 3 (Birth Date and Last Name). A blue 'FIND CUSTOMER' button is at the bottom left, also circled in red.

Create New Customer

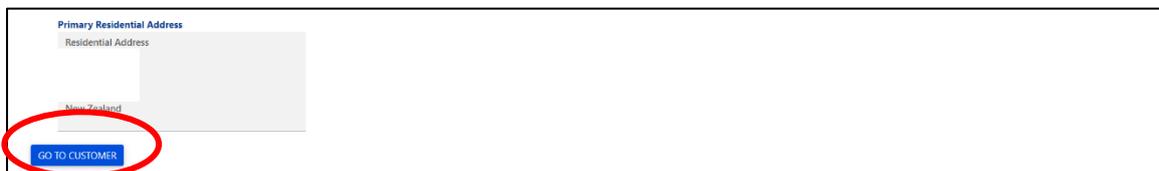
Complete the compulsory (**red asterisk ***) and additional fields if applicable, then click on the blue 'Create Customer' button.

Acknowledge the privacy statement by clicking 'ok'.

This will give you the opportunity to review the information, then click the 'Select Customer' button.

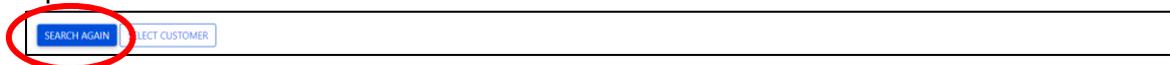


Then click on the blue 'Go To Customer' button



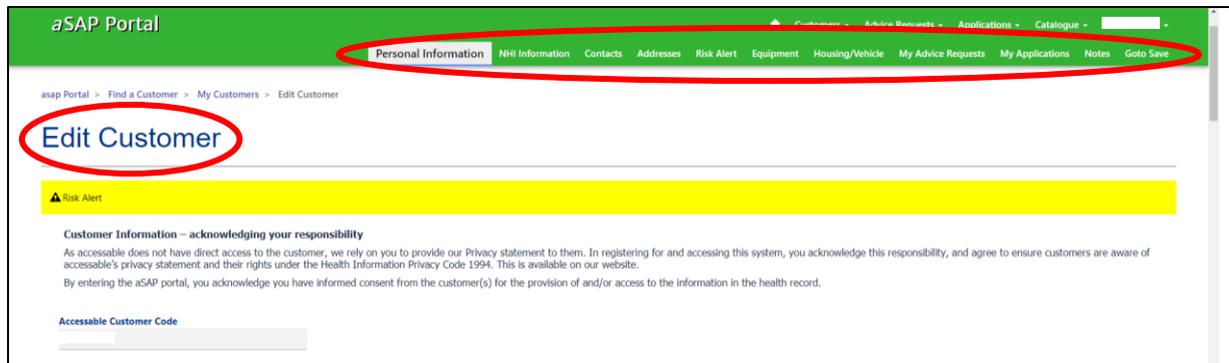
Once you click the 'Go to Customer' button, you will then be taken the 'Edit Customer' screen to add additional information.

Note: If you need to search again, select search again and you are able to re-enter into Option 1 and 3 search fields

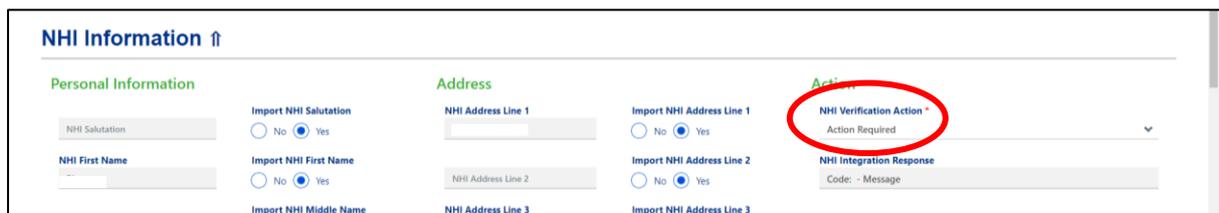


Once you are in the 'Customer' you will see two rows of tabs in the top green ribbon. You can click on the lower row to jump straight to the relevant section.

Top Tip: You will need to save before you change to another tab.

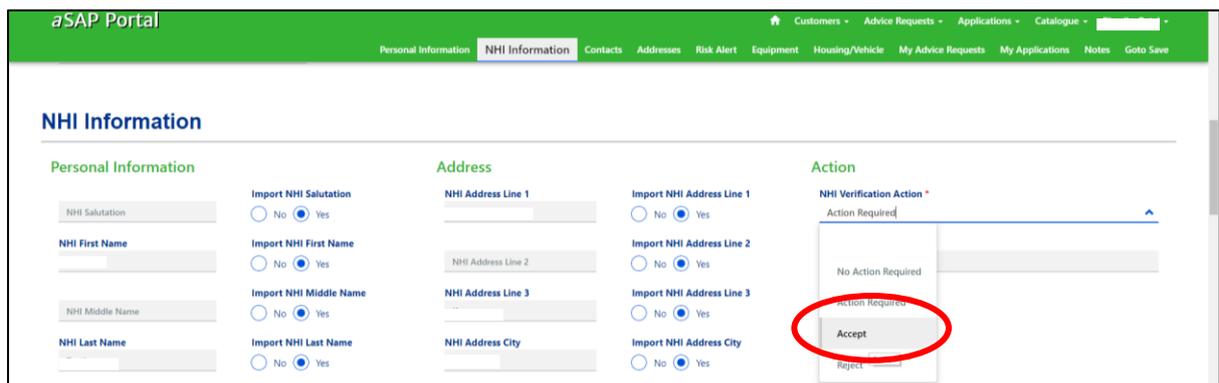


NHI Information Section: You will see this view only when the customer is new to Accessable. This will disappear once you have selected an action from the 'NHI Verification Action' dropdown list under the 'Action' section.



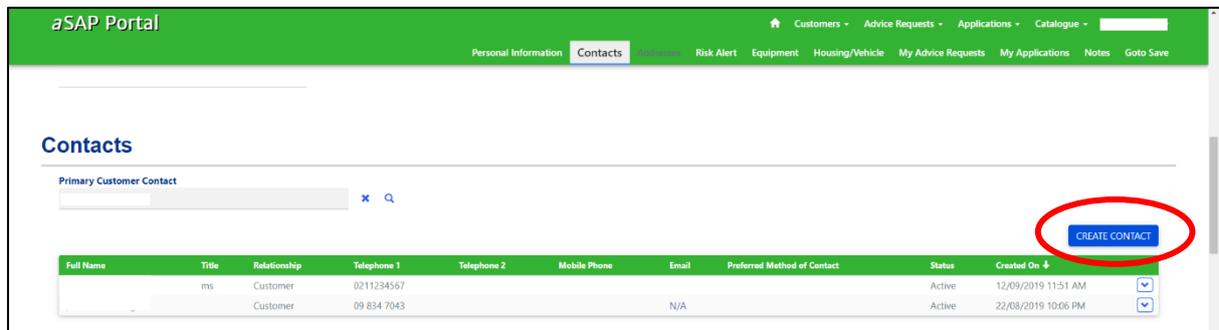
If you agree with the information displayed, then select 'Accept' from the dropdown list.

This will transfer over the information displayed from the MoH database to the aSAP database.

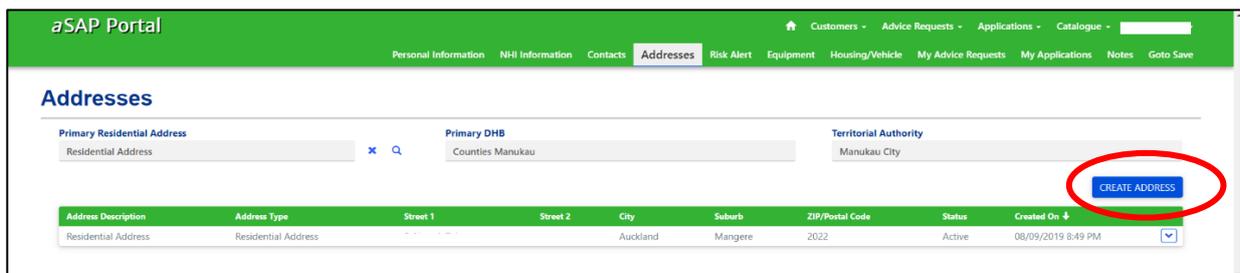




Contacts Section: you can create multiple contacts by clicking on the blue ‘Create Contact’ button and filling out the necessary fields. To select a primary contact for the customer, click on the magnifying glass search function and select the appropriate contact from the pop-up box which opens.

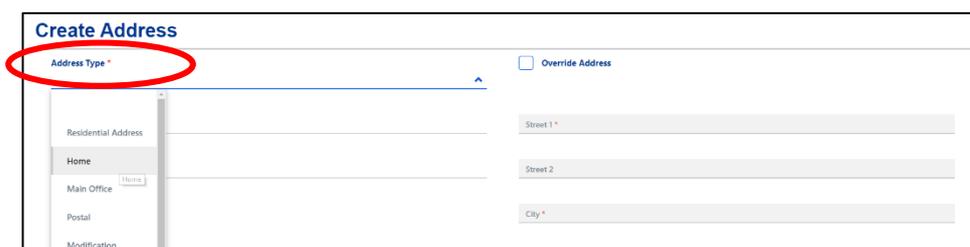


Addresses Section: To add a new address, click on the blue ‘Create Address’ button and the Create Address box will pop up (see next screen shot).

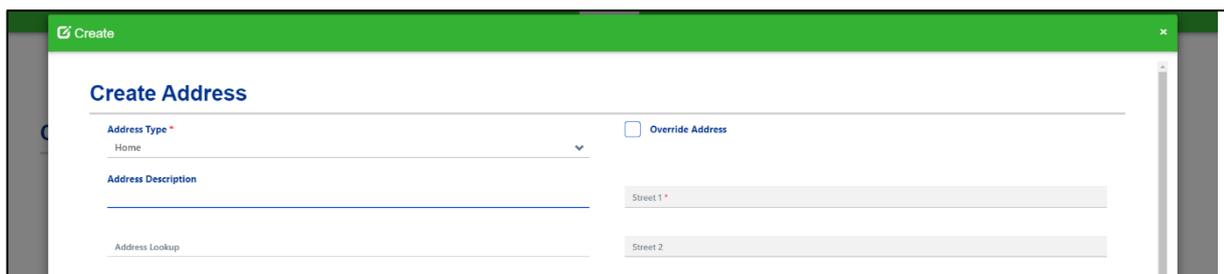
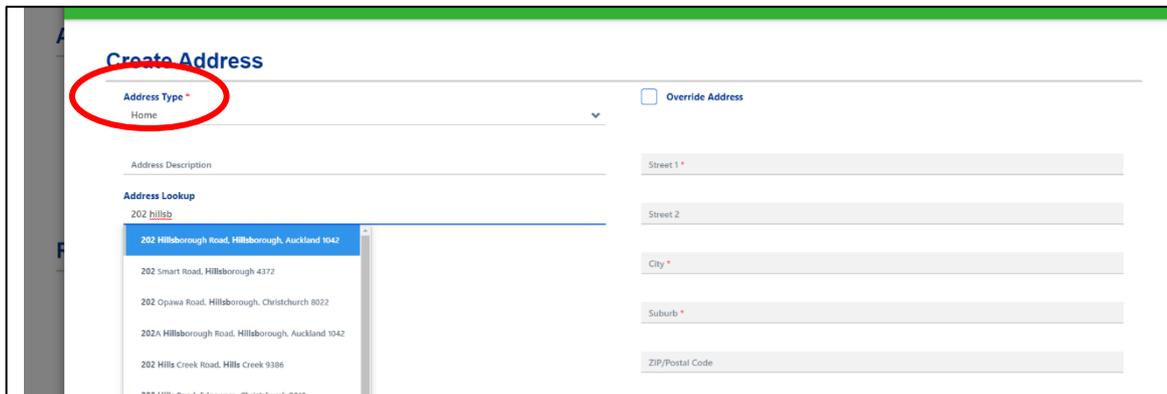


Address Type Field: Select the relevant Address Type from the drop-down list:

Address Description Field: this is a free text box and what you write here is visible in the ‘Address Description’ field on the main customer page.



Selecting the Address: The quickest and easiest way to load an address is to use the ‘Address Lookup’ option. Start typing the address and this auto-searches in the NZ Post address database. Locate the correct address from the drop-down list and the information will auto-populate in the sections on the right-hand side.



Top tip: Using the NZ Post address database is a very important step as it ensures the suburb and city match the NZ Post algorithm, as this has been causing some error messages.

Once all the address fields are populated click the blue ‘Save’ button at the bottom left and this pop-up box will close.



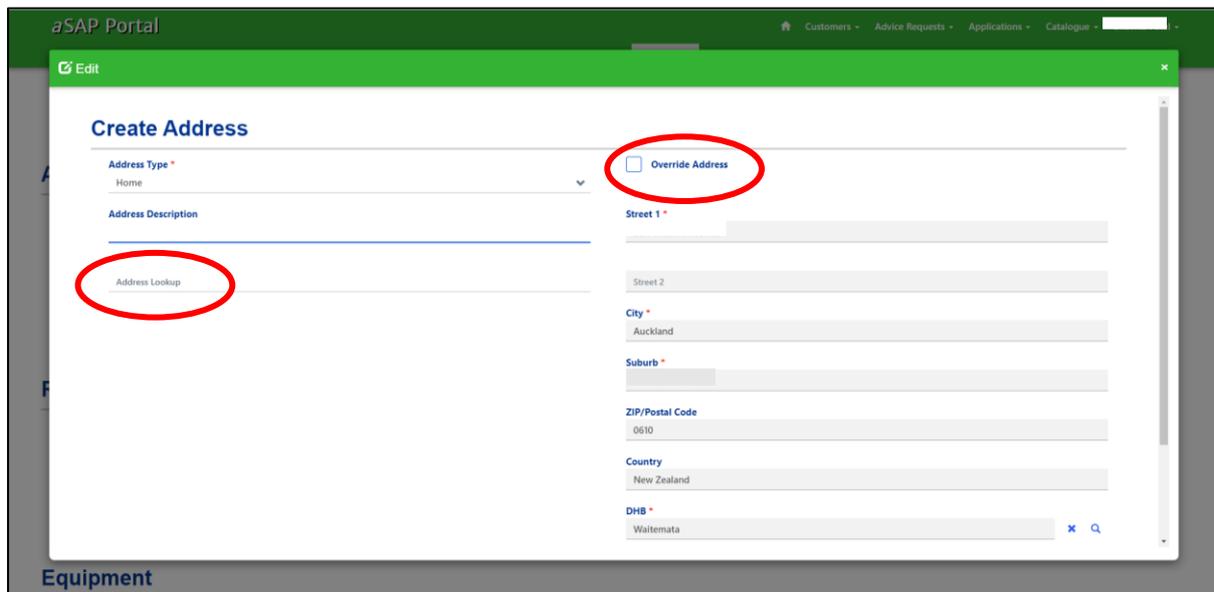
Editing an Address: To edit the details of an existing address select ‘Edit’ from the dropdown arrow on the right then complete the relevant information in the fields. When finished click the blue ‘Save’ button at the bottom left and the pop-up box will close.



Note: To populate the suburb or any missing address information, start typing the address in the 'Address Lookup' field as this auto-searches in the NZ Post database. Locate and select the correct address and the information will auto-populate in the sections on the right-hand side.

Scroll to the bottom and click the blue 'save' button and the pop-up box will close.

The 'Override Address' box allows you to manually change any of the address details.



Primary DHB and Territorial Authority fields: If these are blank on the main customer page you can populate them by clicking on the look up magnifying glass icon next to the Primary Residential Address field (see next screenshot).

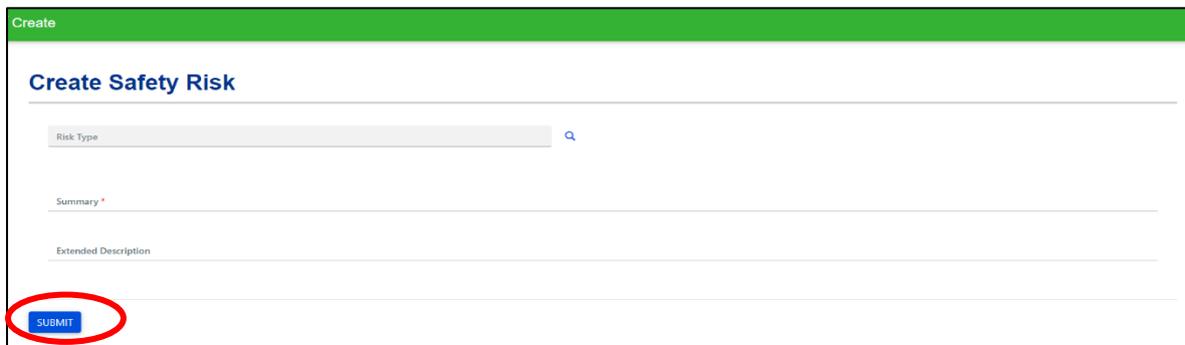
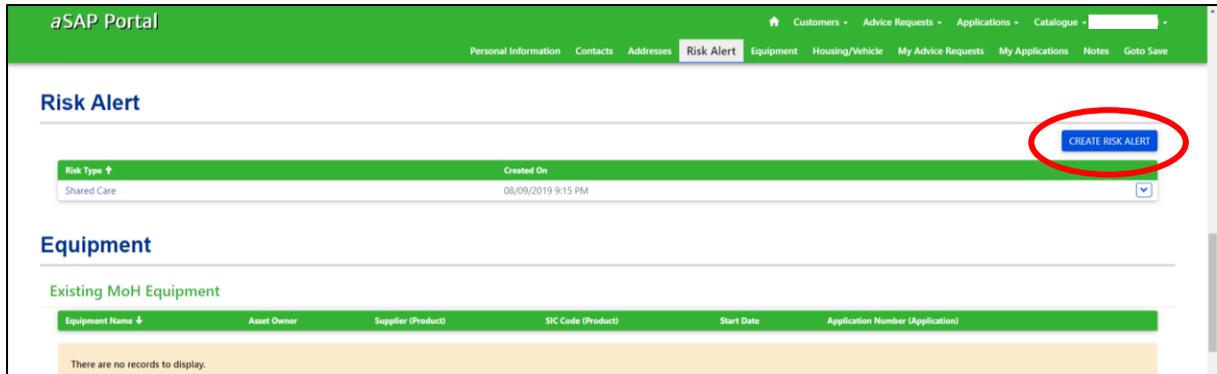
Information Tip: The Primary DHB is the DHB where the customer resides, and the Territorial Authority relates to the council area where the customer resides, e.g. Auckland City, Waitakere City, Manukau City, North Shore City, Papakura District, Franklin District.



If there are multiple customer addresses, click the address you want to use.



Risk Alert Section: To add a risk alert for the customer, click on the blue ‘Create Risk Alert’ button and a pop-up box will open to complete and submit.



Please note the additional sections in the ‘Customer’ will show you the equipment and services associated with your Customer post the aSAP go live.

Note: A historical view will need to be requested.

Goto Save: the all-important save button! Best practice is to click on the blue ‘Save Customer’ button after you have made changes to a section or inputted further information.