

# MANUAL PROCEDURE FOR ACC TRIAL CONTINUATION PROCESS

01. Go to the “**All Active Applications**” view and select the trial application you want to provide the outcome by selecting “**Edit**” option. The Assessor can use different filtering criteria to search for the correct trial application.

Customer First Name :  
Customer Last Name :  
Claim Number :  
Application Number :  
Application Status : Select...  
Assessor Name :  
Case Owner Name :  
Created On : Select...  
Application Type :  
☐ Equipment  
☐ Housing Modification  
☐ Vehicle Modification  
Application Sub Type :  
☐ Equipment Purchase  
☐ Equipment Hire  
☐ Equipment Trial

All Active Applications

Application Number	Claim Number	Application Type	Application Sub Type	Customer	Assessor	Status	Date Submitted	Created On	Owner
APP000400	10028946927	Equipment	Trial	Doreen Green	ACC Assessor 1	Fulfilled		06/09/2019 10:29 AM	asap- CSR

View details  
Edit

02. Navigate into the “**Items**” section in the application to view all the trial equipment that are in the submitted application. The assessor needs to select individual equipment to provide the outcome of the trial item. It can do by selecting the “**Edit**” function that available at the end of the equipment line.

General Details Address Information Items Collaborations Supporting Documents Comments Change Assessor Application Withdrawal Goto Save

021234567

Delivery Contact Mobile

Special notes for equipment delivery

Items

Total Equipment Cost (Inc GST) 15197.84  
Total Equipment Cost (Excl GST) 13215.51

Catalogue Items

Catalogue Product	Supplier	Supplier Product Code	Price Payable After Discount	Catalogue Type	Quantity
10kmh High Speed Upgrade Package - C300/K300	Permobil New Zealand Limited	I10637	\$1,500.00	Non-Listed	1
10"x10" Cushion Rigidiser	Medical Fabrication	1110-1010-200	\$100.00	Non-Listed	
Apex Aluminium Large Wheelchair	Custom Technologies Ltd	Apex AL - Large	\$5,365.51	Non-Listed	
Viking L Patient Hoist	Usl Medical	L2040044	\$6,250.00	Non-Listed	

View details  
Edit

Non Catalogue Items

Non Catalogue Product	Supplier	Supplier Product Code	Price Payable After Discount	Product Type	Quantity
There are no records to display.					

03. In the edit form, go to the **“Trial Decision”** section and provide the outcome. There are four options available in the system for the assessors to provide their outcome.

### 3.1. Trial Outcome decision is “Extend.”

If the Assessor wants to extend the selected trial equipment, they will select this option from the Trial outcome decision and provide the reason for the extension under the **“Outcome Reason”** section as it is a mandatory field to fill. Once all the required information provided, go to the bottom of the form and click the **“Save”** button to save the entered information.

The screenshot shows the 'Edit' form with the following details:

- Trial Details**
  - Expected Trial Start Date: 19/08/2019
  - Expected Trial End Date: 09/09/2019
  - Trial Approved Date: 06/09/2019 11:15 AM
  - Actual Trial Equipment Delivery Date: (empty)
  - Trial Duration (Working Days): 16
  - Estimated Trial Equipment Delivery Date: (empty)
- Trial Decision**: Extend
- Outcome Reason**: Need more time
- Accreditation**: WMPML2, WMPML2P, WSA

The screenshot shows the 'Edit' form with the following details:

- PAT Support**
  - PAT Approval Status: Required
  - PAT Outcome Decision: PAT Outcome Decision
  - PAT Approval Required Reason: Non-List equipment from catalogue - New > \$1000
  - PAT Declined Reason/Comments: (empty)
- Notes**
  - Timeline: There are no activities to display.
- SAVE** button

### 3.2. Trial Outcome decision is Successful

The Assessor can select the **“Successful”** option as outcome decision and can provide any notes under the **“Outcome Reason”** section. This field is not a mandatory field for this selection. However, we encourage the Assessors to enter the information as it will help when to review the applications later. Once all the required information provided, go to the bottom of the form and click the **“Save”** button to save the entered information.

The screenshot shows the 'Edit' form with a green header bar. The form contains several input fields and dropdown menus. The 'Trial Decision' dropdown is highlighted with a red box and set to 'Successful'. Below it, the 'Outcome Reason' field is empty. A dropdown menu for 'Accreditation' is open, showing options: WMPML2, WMPML2P, and WSA. Other fields include 'Expected Trial End Date' (09/09/2019), 'Trial Approved Date' (06/09/2019 11:15 AM), 'Estimated Trial Equipment Delivery Date', and 'Actual Trial Equipment Delivery Date'. The 'Responsible for collection' dropdown is also visible.

The screenshot shows the 'Edit' form with a green header bar. The 'WSA' dropdown is at the top. The 'PAT Support' section includes 'PAT Approval Status' (Required), 'PAT Approval Required Reason' (Non-List equipment from catalogue - New > \$1000), and 'PAT Outcome Decision'. The 'Notes' section has a 'Timeline' header and a message: 'There are no activities to display.' A 'SAVE' button is highlighted with a red box at the bottom left, and an 'ADD COMMENT' button is at the bottom right.

### 3.3. Trial Outcome decision is Unsuccessful

The Assessors can select Trial outcome decision as **“Unsuccessful”** if the equipment is unsuccessful. If the equipment is unsuccessful, it is required to provide the reason for unsuccessful under the **“Outcome Reason”** and person who will collect the equipment under the **“Responsible for collection”**. When the Assessor selects the **“Supplier”** as **“Responsible for collection”**, the system will automatically send a portal notification to the Supplier to collect the equipment. It will trigger at the time of process the application. Once all the required information provided, go to the bottom of the form and click the **“Save”** button to save the entered information.

The screenshot shows the 'Edit' form with the following fields and values:

- Trial Decision:** Unsuccessful
- Responsible for collection \*:** Supplier
- Outcome Reason \*:** The sizing is incorrect
- Accreditation:** WMPML2, WMPML2P, WSA
- PAT Support:**
  - PAT Approval Status:** Required
  - PAT Outcome Decision:** PAT Outcome Decision
  - PAT Approval Required Reason:** Non-List equipment from catalogue - New > \$1000
  - PAT Declined Reason/Comments:**

The screenshot shows the 'Edit' form with the following fields and values:

- WSA:**
- PAT Support:**
  - PAT Approval Status:** Required
  - PAT Outcome Decision:** PAT Outcome Decision
  - PAT Approval Required Reason:** Non-List equipment from catalogue - New > \$1000
  - PAT Declined Reason/Comments:**
- Notes:**
  - Timeline:** There are no activities to display.
  - ADD COMMENT:**
- SAVE:**

### 3.4. Trial Outcome decision is Unsuccessful & Add New Trial

The Assessor requires to select this option if they have only one equipment in the application or all the equipment in the application are unsuccessful and need to trial with new equipment. They will select the Trial outcome decision as **“Unsuccessful & Add New Trial”** and provide the reason for unsuccessful under the **“Outcome Reason”**. Also, select the person who will collect the equipment under the **“Responsible for collection”**. The Assessor requires to select this option if they have one equipment in the application or all the equipment in the application are unsuccessful and need to trial with new equipment.

The screenshot shows the 'Edit' form with a green header bar. The form contains several fields and sections:

- Total Discount**: A text input field.
- Price Payable After Discount**: A text input field showing '\$ 5365.51'.
- Trial Details**: A section header.
- Expected Trial Start Date**: A date picker showing '19/08/2019'.
- Expected Trial End Date**: A date picker showing '09/09/2019'.
- Trial Duration (Working Days)**: A text input field showing '16'.
- Trial Decision**: A dropdown menu with 'Unsuccessful & Add New Trial' selected.
- Responsible for collection**: A dropdown menu with 'Assessor' selected.
- Outcome Reason \***: A text input field with 'Equipment doesn't meet the clients need'.
- Accreditation**: A section header with a green background.
- Accreditation**: A list of options: WMPML2, WMPML2P, and WSA.

The screenshot shows the 'Edit' form with a green header bar. The form contains several fields and sections:

- WSA**: A text input field.
- PAT Support**: A section header.
- PAT Approval Status**: A dropdown menu with 'Required' selected.
- PAT Outcome Decision**: A dropdown menu.
- PAT Approval Required Reason**: A text input field with 'Non-List equipment from catalogue - New > \$1000'.
- PAT Declined Reason/Comments**: A text input field.
- Notes**: A section header.
- Timeline**: A section header.
- ADD COMMENT**: A button.
- There are no activities to display.**: A message in a yellow box.
- SAVE**: A button.

04. Once the Assessor provided their decisions against all the equipment, go to the bottom of the application and press the **“Process”** button. The system will prompt a message to the Assessor by notifying the decisions they have given against each equipment and requesting their permission to continue with the application. Once the Assessor click **“OK”** button, the system will process the trial application and creates child applications based on the outcomes provided by the assessor. Refer below example how the process behaves.

**Example:** The initial trial application contains four equipment and Assessor has given the outcome results as follows;

Trial Equipment	Trial Outcome
10kmh High Speed Upgrade Package - C300/K300	Extend
10"x10" Cushion Rigidiser	Successful
Apex Aluminium Large Wheelchair	Unsuccessful
Viking L Patient Hoist	Extend

In this situation, the system will create two separate child applications for **“Successful”** & **“Extend”** equipment and **“Unsuccessful”** equipment will stay with the parent application.

05. The system will start to process the application to create the child applications, and the system shows a message to Assessor informing it's processing. During this time the Assessor should not disturb the process until it's finished.

**accessable**  
aSAP Portal

Customers - Advice Requests Applications - Catalogue - ACC Assessor 1 -

General Details Address Information Items Collaborations Supporting Documents Comments Change Assessor Application Withdrawal Goto Save

asap Portal > Applications (ACC Assessor) > Edit Application (ACC Assessor)

## Edit Application (ACC Assessor)

▲ Processing...

### General

#### Info

Application Number  
APP000400

Application Contract Type  
ACC - ACC-MRES - Equipment - Trial

Status  
Fulfilled

Last Updated DateTime  
06/09/2019 2:14 PM

#### Assessor

Assessor \*  
ACC Assessor 1

Assessor Organisation  
accessable

Assessor Default Branch  
accessable - Auckland

### Details

06. Once the process completed, the “Process” bar will disappear from the application view.

**accessable**  
aSAP Portal

Customers - Advice Requests Applications - Catalogue - ACC Assessor 1 -

General Details Address Information Items Collaborations Supporting Documents Comments Change Assessor Goto Save

asap Portal > Applications (ACC Assessor) > Edit Application (ACC Assessor)

## Edit Application (ACC Assessor)

### General

#### Info

Application Number  
APP000400

Application Contract Type  
ACC - ACC-MRES - Equipment - Trial

Status  
Completed

Last Updated DateTime  
06/09/2019 2:28 PM

#### Assessor

Assessor \*  
ACC Assessor 1

Assessor Organisation  
accessable

Assessor Default Branch  
accessable - Auckland

### Details

07. The Assessor requires to go to the **“All Active Applications”** view to see the created child applications. These applications are stays in the **“Solution Build”** stage which means you need to resubmit it. The trial child applications always use the parent application number along with a suffix number. Ex: APP000400-1, APP000400-2.

The screenshot shows the 'aSAP Portal' interface for the 'Applications (ACC Assessor)' section. On the left is a filter sidebar with fields for Customer First Name, Customer Last Name, Claim Number, Application Number, Application Status (dropdown), Assessor Name, Case Owner Name, Created On (dropdown), Application Type (checkboxes for Equipment, Housing Modification, Vehicle Modification), and Application Sub Type (checkboxes for Equipment Purchase, Equipment Hire, Equipment Trial). The main area displays a table titled 'All Active Applications' with a search bar and a 'CREATE' button. The table has columns: Application Number, Claim Number, Application Type, Application Sub Type, Customer, Assessor, Status, Date Submitted, Created On, and Owner. Two rows are visible, both with status 'Solution Build'.

Application Number	Claim Number	Application Type	Application Sub Type	Customer	Assessor	Status	Date Submitted	Created On	Owner
APP000400-2	1002846927	Equipment	Trial	Doreen Green	ACC Assessor 1	Solution Build		06/09/2019 2:28 PM	SYSTEM
APP000400-1	1002846927	Equipment	Purchase	Doreen Green	ACC Assessor 1	Solution Build		06/09/2019 2:27 PM	SYSTEM

08. The parent application will turn into the **“Inactive”** stage and Assessor can view all the inactive applications under **“All Inactive Applications”** view.

The screenshot shows the 'aSAP Portal' interface for the 'Applications (ACC Assessor)' section, specifically the 'All Inactive Applications' view. The filter sidebar on the left is identical to the previous screenshot. The main table, titled 'All Inactive Applications', has columns: Application Number, Customer, Assessor, Funder, Status, Date Submitted, Created On, and Owner. One row is visible with status 'Completed'.

Application Number	Customer	Assessor	Funder	Status	Date Submitted	Created On	Owner
APP000400	Doreen Green	ACC Assessor 1	ACC	Completed		06/09/2019 10:29 AM	asap- CSR



09. Assessor requires to resubmit the child applications to continue their trial or purchase equipment. In this situation, Assessors can add more items into the child applications before they resubmit it. If the child application is Extended trial application, the assessor requires to go into the **“Items”** section and provide the new trial end date against extended equipment. The assessor can do this by selecting the **“Edit”** function.

The screenshot shows the 'aSAP Portal' interface with the 'Items' section selected. The top navigation bar includes 'General', 'Details', 'Address Information', 'Items', 'Collaborations', 'Supporting Documents', 'Comments', 'Change Assessor', and 'Goto Save'. The 'Items' section displays two tables: 'Catalogue Items' and 'Non Catalogue Items'. The 'Catalogue Items' table has columns for 'Catalogue Product', 'Supplier', 'Supplier Product Code', 'Price Payable After Discount', 'Catalogue Type', and 'Quantity'. It lists two items: '10kmh High Speed Upgrade Package - C300/K300' and 'Viking L Patient Hoist'. The 'Non Catalogue Items' table is currently empty, displaying 'There are no records to display.' A dropdown menu is open next to the 'Viking L Patient Hoist' item, showing 'View details' and 'Edit' options. The 'Edit' option is highlighted with a red box.

Catalogue Product	Supplier	Supplier Product Code	Price Payable After Discount	Catalogue Type	Quantity
10kmh High Speed Upgrade Package - C300/K300	Permobil New Zealand Limited	110637	\$1,500.00	Non-Listed	1
Viking L Patient Hoist	Usl Medical	L2040044	\$6,250.00	Non-Listed	1

Non Catalogue Product	Supplier	Supplier Product Code	Price Payable After Discount	Product Type	Quantity
There are no records to display.					

When the Assessor opens the equipment edit form, the system will automatically populate the initial equipment end date as the starting date of the extended equipment and Assessor requires to provide only the new end date. However, if the Assessor adds new equipment into the application, then they required to provide both start and end trial dates. Once all the required information provided, go to the bottom of the form and click the **“Save”** button to save the entered information.

The screenshot shows the 'Edit' form in the aSAP Portal. The form includes fields for 'Total Price Before Discount', 'Discount (%)', 'Total Discount', 'Price Payable After Discount', 'Trial Duration (Working Days)', 'Trial Approved Date', 'Estimated Trial Equipment Delivery Date', and 'Actual Trial Equipment Delivery Date'. The 'Trial Details' section is highlighted with a red box, showing fields for 'Expected Trial Start Date' and 'Expected Trial End Date'. The 'Expected Trial Start Date' is populated with '30/09/2019'. The 'Accreditation' section at the bottom shows 'WMPML1'.

Expected Trial Start Date *	Expected Trial End Date *
30/09/2019	



11. Also, there is a separate view for the Assessors to see all the equipment that is on trial. This view will give more details like Number of “**Days to Trial End Date**”, “**Next Notification Due Date**”, etc. Assessors can navigate to this view by clicking the “**Applications**” menu.

Applications (ACC Assessor)

Customer First Name :  
Customer Last Name :  
Claim Number :  
Application Number :  
Application Status : Select...  
Assessor Name :  
Case Owner Name :  
Created On : Select...  
Application Type :  
☐ Equipment  
☐ Housing Modification  
☐ Vehicle Modification  
Application Sub Type :  
☐ Equipment Purchase  
☐ Equipment Hire  
☐ Equipment Trial

All Active Applications

Application Number	Claim Number	Application Type	Application Sub Type	Customer	Assessor	Solution Build	Created On	Owner
APP000400-2	10028846927	Equipment	Trial	Doreen Green	ACC Assessor 1	Solution Build	06/09/2019 2:28 PM	SYSTEM
APP000400-1	10028846927	Equipment	Purchase	Doreen Green	ACC Assessor 1	Solution Build	06/09/2019 2:27 PM	SYSTEM

My Trial Items

Application/Service Request:  
Customer First Name:  
Customer Last Name:  
Number of Days to Trial End Date:  
☐ Less Than 7  
☐ Less Than 14  
Number of Extensions:  
☐ 1  
☐ 2  
☐ 3 or more  
FIND

Search...

Application	Application Number (Application)	Customer	Product Catalogue	SIC Code (Product Catalogue)	Quantity	Next Notification Due Date
Trial application	APP000400-2	Doreen Green	10kmh High Speed Upgrade Package - C300/K300	ENON	1	03/10/2019
Trial application	APP000400-2	Doreen Green	Viking L Patient Hoist	ENON	1	03/10/2019
Trial application	APP000400	Doreen Green	10kmh High Speed Upgrade Package - C300/K300	ENON	1	03/10/2019
Trial application	APP000400	Doreen Green	10"x10" Cushion Rigidiser	ENON	1	03/10/2019
Trial application	APP000400	Doreen Green	Apex Aluminium Large Wheelchair	ENON	1	02/10/2019
Trial application	APP000400	Doreen Green	Viking L Patient Hoist	ENON	1	03/10/2019

12. To provide the trial outcome, click on the application name and the system will load the application for the Assessor to select the trial outcome. Please follow the steps from point 02 onwards how to update the trial outcome.