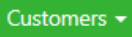

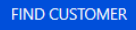


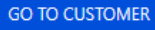
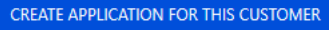


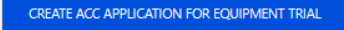
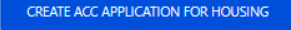
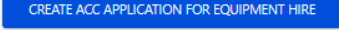
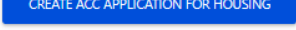


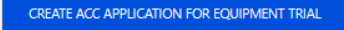
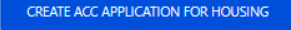
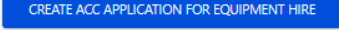
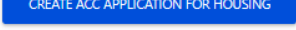


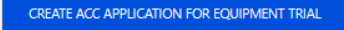
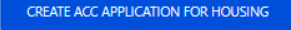
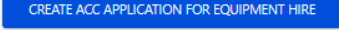
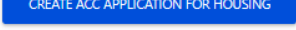

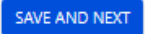


Create an Application from 'Find a Customer' - ACC




Note: Search for a customer before creating a customer

Step	Description										
1.	Click 										
2.	Click 										
3.	Enter one of the following: <ul style="list-style-type: none"> Option 1: NHI Option 2: Claim Number (no spaces or hyphens) Option 3: Birth Date (DD/MM/YYYY) and Last Name 										
4.	Click 										
5.	If the customer is found, go to Step 6 If the customer is not found, go to Step 7										
6.	<p>Customer is found during the customer search</p> <ul style="list-style-type: none"> The Personal Information screen of the customer record displays Click  <p>Note: Click  to complete another Customer search</p> <ul style="list-style-type: none"> To edit a Customer's details, click  to open the Edit Customer page To create an application: <ul style="list-style-type: none"> Click  Click the relevant button for the type of application to be created <p>Note: The application types depend on your role:</p> <table border="1" data-bbox="453 1509 1289 1839"> <thead> <tr> <th>ACC Assessor</th> <th>ACC Case Owner</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> </tbody> </table>	ACC Assessor	ACC Case Owner								
ACC Assessor	ACC Case Owner										
											
											
											
											

Step	Description														
	<p data-bbox="240 293 1353 365">In the Confirmation of Customer and Application Details page, enter required fields marked with an asterisk which have not auto-populated:</p> <table border="1" data-bbox="264 383 1366 875"> <thead> <tr> <th data-bbox="264 383 663 439">Section</th> <th data-bbox="663 383 1366 439">Enter required fields</th> </tr> </thead> <tbody> <tr> <td data-bbox="264 439 663 629">Personal Information (auto-populated fields)</td> <td data-bbox="663 439 1366 629"> <ul style="list-style-type: none"> • First Name* • Last Name* • Date of Birth* • Gender* </td> </tr> <tr> <td data-bbox="264 629 663 725">Customer Contact Information</td> <td data-bbox="663 629 1366 725"> <ul style="list-style-type: none"> • Phone Number* </td> </tr> <tr> <td data-bbox="264 725 663 875">ACC Claims</td> <td data-bbox="663 725 1366 875"> <ul style="list-style-type: none"> • Select Existing Claim • Enter New Claim Number* • Case Owner* </td> </tr> </tbody> </table> <p data-bbox="240 943 815 976">Note: If required, enter Safety Risks details</p> <ul style="list-style-type: none"> <li data-bbox="288 1003 1353 1126">• Click <input type="button" value="SAVE AND NEXT"/> <p data-bbox="336 1055 1353 1126">Note: The Application number is generated and displays in the Application Summary section</p> <li data-bbox="288 1173 1353 1207">• In the Application Delivery Details page, complete the relevant check-boxes <table border="1" data-bbox="264 1225 1366 2016"> <thead> <tr> <th data-bbox="264 1225 663 1281">Section</th> <th data-bbox="663 1225 1366 1281">Checkbox</th> </tr> </thead> <tbody> <tr> <td data-bbox="264 1281 663 1406">Application Summary</td> <td data-bbox="663 1281 1366 1406"> <ul style="list-style-type: none"> • Tick <input type="checkbox"/> Urgent Delivery if the application is Urgent </td> </tr> <tr> <td data-bbox="264 1406 663 2016">Delivery Address</td> <td data-bbox="663 1406 1366 2016"> <ul style="list-style-type: none"> • The customer primary address is selected by default <input checked="" type="checkbox"/> Use Existing Customer Primary Address • To change the address from the Customer Primary Address, tick one of the other options: <ul style="list-style-type: none"> <input type="checkbox"/> Use Alternate Customer Address <input type="checkbox"/> Use Assessor's Address <input type="checkbox"/> Enter Other Delivery Address <p data-bbox="683 1821 1281 2002">Note: If an address cannot be found, click <input type="checkbox"/> Manually enter address if not already found and populate the required fields Address Line 1 and Suburb</p> </td> </tr> </tbody> </table>	Section	Enter required fields	Personal Information (auto-populated fields)	<ul style="list-style-type: none"> • First Name* • Last Name* • Date of Birth* • Gender* 	Customer Contact Information	<ul style="list-style-type: none"> • Phone Number* 	ACC Claims	<ul style="list-style-type: none"> • Select Existing Claim • Enter New Claim Number* • Case Owner* 	Section	Checkbox	Application Summary	<ul style="list-style-type: none"> • Tick <input type="checkbox"/> Urgent Delivery if the application is Urgent 	Delivery Address	<ul style="list-style-type: none"> • The customer primary address is selected by default <input checked="" type="checkbox"/> Use Existing Customer Primary Address • To change the address from the Customer Primary Address, tick one of the other options: <ul style="list-style-type: none"> <input type="checkbox"/> Use Alternate Customer Address <input type="checkbox"/> Use Assessor's Address <input type="checkbox"/> Enter Other Delivery Address <p data-bbox="683 1821 1281 2002">Note: If an address cannot be found, click <input type="checkbox"/> Manually enter address if not already found and populate the required fields Address Line 1 and Suburb</p>
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Step	Description
	<div data-bbox="268 282 1369 707" style="border: 1px solid black; padding: 5px;"> <p>Note: To Use Alternate Customer Address, click  and select address from lookup list</p> <p>Note: Use Address Finder - start typing address here to Enter Other Delivery Address. To save the Other Delivery Address as the customer's primary address, tick <input type="checkbox"/> Save new address as customer primary</p> </div> <div data-bbox="268 707 1369 1043" style="border: 1px solid black; padding: 5px;"> <p>Delivery Contact Details</p> <ul style="list-style-type: none"> • Tick one of the options: <ul style="list-style-type: none"> <input type="checkbox"/> Use Customer Details <input type="checkbox"/> Use Alternative Contact Details <input type="checkbox"/> Use Assessor Details <input type="checkbox"/> Add Other Details • Enter required delivery fields if not auto-populated </div> <ul style="list-style-type: none"> • Click . The Edit Application page displays <p>Note: Some sections of the application are collapsed. To expand a collapsed section of the application, click the name of the section title</p> <ul style="list-style-type: none"> • Complete and submit the Application as usual
7.	<p>Customer is not found during the customer search</p> <ul style="list-style-type: none"> • A Customer not found message displays • To Create a Customer and an Application, go to Step 8 • To Create a Customer Only, go to Step 9

Step	Description																				
8.	<p data-bbox="240 297 687 331">Create Customer and Application</p> <ul data-bbox="288 365 1206 443" style="list-style-type: none"> <li data-bbox="288 365 730 398">• Click CREATE CUSTOMER AND APPLICATION <li data-bbox="288 409 1206 443">• Click the relevant button for the type of application to be created <p data-bbox="336 450 995 483">Note: The application types depend on your role:</p> <table border="1" data-bbox="454 501 1291 806"> <thead> <tr> <th data-bbox="454 501 871 555">ACC Assessor</th> <th data-bbox="871 501 1291 555">ACC Case Owner</th> </tr> </thead> <tbody> <tr> <td data-bbox="454 555 871 622">CREATE ACC APPLICATION FOR EQUIPMENT PURCHASE</td> <td data-bbox="871 555 1291 622">CREATE ACC APPLICATION FOR EQUIPMENT PURCHASE</td> </tr> <tr> <td data-bbox="454 622 871 678">CREATE ACC APPLICATION FOR EQUIPMENT TRIAL</td> <td data-bbox="871 622 1291 678">CREATE ACC APPLICATION FOR HOUSING</td> </tr> <tr> <td data-bbox="454 678 871 734">CREATE ACC APPLICATION FOR EQUIPMENT HIRE</td> <td data-bbox="871 678 1291 734"></td> </tr> <tr> <td data-bbox="454 734 871 806">CREATE ACC APPLICATION FOR HOUSING</td> <td data-bbox="871 734 1291 806"></td> </tr> </tbody> </table> <p data-bbox="240 884 1353 958">In the Confirmation of Customer and Application Details page, enter required fields marked with an asterisk:</p> <table border="1" data-bbox="264 974 1367 1621"> <thead> <tr> <th data-bbox="264 974 663 1032">Section</th> <th data-bbox="663 974 1367 1032">Enter required fields</th> </tr> </thead> <tbody> <tr> <td data-bbox="264 1032 663 1223">Personal Information</td> <td data-bbox="663 1032 1367 1223"> <ul data-bbox="679 1048 1225 1205" style="list-style-type: none"> <li data-bbox="679 1048 895 1081">• First Name* <li data-bbox="679 1093 895 1126">• Last Name* <li data-bbox="679 1137 919 1171">• Date of Birth* <li data-bbox="679 1182 1225 1205">• Gender*. Select from drop-down list </td> </tr> <tr> <td data-bbox="264 1223 663 1413">Customer Primary Address</td> <td data-bbox="663 1223 1367 1413"> <ul data-bbox="679 1238 1214 1305" style="list-style-type: none"> <li data-bbox="679 1238 1214 1305">• Enter the address in Address Finder Address Finder - start typing address here <p data-bbox="679 1328 1289 1395">Note: This will populate the required fields: Street 1, Suburb, City and Postal Code</p> </td> </tr> <tr> <td data-bbox="264 1413 663 1514">Customer Contact Information</td> <td data-bbox="663 1413 1367 1514"> <ul data-bbox="679 1429 954 1462" style="list-style-type: none"> <li data-bbox="679 1429 954 1462">• Phone Number* </td> </tr> <tr> <td data-bbox="264 1514 663 1621">ACC Claim</td> <td data-bbox="663 1514 1367 1621"> <ul data-bbox="679 1529 1090 1597" style="list-style-type: none"> <li data-bbox="679 1529 1090 1563">• Enter New Claim Number* <li data-bbox="679 1574 911 1597">• Case Owner* </td> </tr> </tbody> </table> <p data-bbox="240 1688 1139 1722">Note: If required, enter Alternative Contact and Safety Risks details</p> <ul data-bbox="288 1756 1353 1951" style="list-style-type: none"> <li data-bbox="288 1756 552 1789">• Click SAVE AND NEXT <p data-bbox="336 1800 1353 1868">Note: The Application number is generated and displays in the Application Summary section</p> <p data-bbox="336 1879 1326 1951">Note: The Customer is created and can be viewed under Customers > My Customers</p>	ACC Assessor	ACC Case Owner	CREATE ACC APPLICATION FOR EQUIPMENT PURCHASE	CREATE ACC APPLICATION FOR EQUIPMENT PURCHASE	CREATE ACC APPLICATION FOR EQUIPMENT TRIAL	CREATE ACC APPLICATION FOR HOUSING	CREATE ACC APPLICATION FOR EQUIPMENT HIRE		CREATE ACC APPLICATION FOR HOUSING		Section	Enter required fields	Personal Information	<ul data-bbox="679 1048 1225 1205" style="list-style-type: none"> <li data-bbox="679 1048 895 1081">• First Name* <li data-bbox="679 1093 895 1126">• Last Name* <li data-bbox="679 1137 919 1171">• Date of Birth* <li data-bbox="679 1182 1225 1205">• Gender*. Select from drop-down list 	Customer Primary Address	<ul data-bbox="679 1238 1214 1305" style="list-style-type: none"> <li data-bbox="679 1238 1214 1305">• Enter the address in Address Finder Address Finder - start typing address here <p data-bbox="679 1328 1289 1395">Note: This will populate the required fields: Street 1, Suburb, City and Postal Code</p>	Customer Contact Information	<ul data-bbox="679 1429 954 1462" style="list-style-type: none"> <li data-bbox="679 1429 954 1462">• Phone Number* 	ACC Claim	<ul data-bbox="679 1529 1090 1597" style="list-style-type: none"> <li data-bbox="679 1529 1090 1563">• Enter New Claim Number* <li data-bbox="679 1574 911 1597">• Case Owner*
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Step	Description
9.	<p data-bbox="240 297 560 331">Create a Customer Only</p> <ul data-bbox="288 360 1289 1055" style="list-style-type: none"><li data-bbox="288 360 651 394">• Click CREATE CUSTOMER ONLY<li data-bbox="288 405 1289 1003">• Only enter all required fields marked with an asterisk and required ACC information<ul data-bbox="384 488 979 1003" style="list-style-type: none"><li data-bbox="384 488 496 521">○ Title<li data-bbox="384 533 651 566">○ Preferred Name<li data-bbox="384 577 592 611">○ First Name*<li data-bbox="384 622 612 656">○ Middle Name<li data-bbox="384 667 592 701">○ Last Name*<li data-bbox="384 712 619 745">○ Date of Birth*<li data-bbox="384 757 544 790">○ Gender*<li data-bbox="384 801 571 835">○ Ethnicity*<li data-bbox="384 846 676 880">○ Residency (Other)<li data-bbox="384 891 759 925">○ Primary Disability Type*<li data-bbox="384 936 979 969">○ Serious Injury Client (SIS) – ACC required<li data-bbox="384 981 635 1014">○ Cultural Needs<li data-bbox="384 1025 564 1059">○ Language<li data-bbox="288 1014 1241 1055">• Click CREATE CUSTOMER and complete the customer information as usual