



## Create Equipment – ACC Trial and Purchase or Trial Application

The following types of Equipment Trial Applications can be created:

Application Type	Application Sub Type
Equipment	Trial and Purchase Trial
<b>Completed steps:</b> <ol style="list-style-type: none"> <li>The Assessor has assessed the Customer post referral from ACC and is ready to submit the Application to Accessable.</li> <li>Customer Profile in aSAP is reviewed and is updated where applicable.</li> <li>Recommend Assessor has Customer Claim Number and Equipment Items (supplier codes) ready to support Catalogue Search.</li> </ol>	

Step	Description
1.	<p><b>Search for a Customer using Option 1 or Option 2 or Option 3</b></p> <p><b>Option 1: Applications</b></p> <ol style="list-style-type: none"> <li>Click </li> <li>Click <a href="#">Applications (ACC Assessor)</a></li> <li>Click </li> <li>The Find a Customer page displays, refer to <a href="#">Option 2 c below</a></li> </ol> <p><b>or</b></p> <p><b>Option 2: Find a Customer</b></p> <ol style="list-style-type: none"> <li>Click </li> <li>Click <a href="#">Find a Customer</a></li> <li>Enter one of the following: <ul style="list-style-type: none"> <li>Option 1: NHI</li> <li>Option 2: Claim Number (no spaces or hyphens)</li> <li>Option 3: Birth Date (DD/MM/YYYY) and Last Name</li> </ul> </li> <li>Click </li> </ol> <p><b>or</b></p> <p><b>Option 3: My Customers</b></p> <ol style="list-style-type: none"> <li>Click </li> <li>Click <a href="#">My Customers</a></li> <li>Click  for the customer, and click <a href="#">Create Application</a></li> <li>Go to <a href="#">Step 3</a></li> </ol> <p>If the customer is not found during the search, a <b>Customer not found</b> message displays</p> <ul style="list-style-type: none"> <li>To Create a Customer and an Application, go to <a href="#">Create an Application from 'Find a Customer</a></li> </ul>

	<ul style="list-style-type: none"> <li>To Create a Customer Only, go to <a href="#">Create an Application from 'Find a Customer</a></li> </ul> <p>If the customer is found during the search</p> <ul style="list-style-type: none"> <li>To create an Application for an existing aSAP customer, go to <a href="#">Step 2</a></li> </ul>												
2.	<p><b>Create an application for an existing Customer</b></p> <ol style="list-style-type: none"> <li>The Personal Information screen of the customer record displays</li> <li>Click <a href="#">SELECT CUSTOMER</a> to verify and confirm this Customer  <b>Note:</b> Click <a href="#">SEARCH AGAIN</a> to complete another Customer search</li> <li>To edit a Customer's details, click <a href="#">GO TO CUSTOMER</a>. The Edit Customer page displays</li> <li>To create an Application, click <a href="#">CREATE APPLICATION FOR THIS CUSTOMER</a> and go to <a href="#">Step 3</a></li> </ol>												
3.	<p><b>Select the type of Application required and confirm Customer and Application Details</b></p> <ol style="list-style-type: none"> <li>Click the relevant button for the type of Application to be created  <div style="border: 1px solid black; background-color: #0070C0; color: white; padding: 2px; text-align: center; margin-bottom: 5px;">CREATE ACC APPLICATION FOR EQUIPMENT TRIAL &amp; PURCHASE</div> <div style="border: 1px solid black; background-color: #0070C0; color: white; padding: 2px; text-align: center;">CREATE ACC APPLICATION FOR EQUIPMENT TRIAL</div> </li> <li>In the Confirmation of Customer and Application Details page, enter required fields marked with an asterisk which have not auto-populated:</li> </ol> <table border="1" data-bbox="264 943 1367 1809"> <thead> <tr> <th style="text-align: center;">Section</th> <th style="text-align: center;">Enter required fields</th> </tr> </thead> <tbody> <tr> <td>Personal Information (auto-populated fields)</td> <td> <ul style="list-style-type: none"> <li>First Name*</li> <li>Last Name*</li> <li>Date of Birth*</li> <li>Gender*</li> <li>NHI Number</li> <li>Serious Injury Client</li> </ul> </td> </tr> <tr> <td>Customer Contact Information</td> <td> <ul style="list-style-type: none"> <li>Phone Number (recommended)</li> <li>Email (recommended)</li> </ul> </td> </tr> <tr> <td>Safety Risks</td> <td>           If required, enter Safety Risks details:           <ul style="list-style-type: none"> <li>Safety Risk Type. Select from drop-down list</li> <li>Safety Risk Description</li> </ul> </td> </tr> <tr> <td>ACC Claims</td> <td> <ul style="list-style-type: none"> <li>Select Existing Claim or Enter New Claim Number*</li> <li>Case Owner*</li> </ul> </td> </tr> <tr> <td>Application Information</td> <td> <ul style="list-style-type: none"> <li>Application Sub Type*  <b>Note:</b> Trial Applications are populated as <b>Trial</b></li> <li>Expected Trial Start Date*</li> <li>Expected Trial Duration (Working Days)*</li> </ul> </td> </tr> </tbody> </table> <ol style="list-style-type: none"> <li>Click <a href="#">PROCEED TO NEXT STEP</a></li> </ol> <p><b>Note:</b> When Processing is complete, the Application number is generated and displays</p>	Section	Enter required fields	Personal Information (auto-populated fields)	<ul style="list-style-type: none"> <li>First Name*</li> <li>Last Name*</li> <li>Date of Birth*</li> <li>Gender*</li> <li>NHI Number</li> <li>Serious Injury Client</li> </ul>	Customer Contact Information	<ul style="list-style-type: none"> <li>Phone Number (recommended)</li> <li>Email (recommended)</li> </ul>	Safety Risks	If required, enter Safety Risks details: <ul style="list-style-type: none"> <li>Safety Risk Type. Select from drop-down list</li> <li>Safety Risk Description</li> </ul>	ACC Claims	<ul style="list-style-type: none"> <li>Select Existing Claim or Enter New Claim Number*</li> <li>Case Owner*</li> </ul>	Application Information	<ul style="list-style-type: none"> <li>Application Sub Type*  <b>Note:</b> Trial Applications are populated as <b>Trial</b></li> <li>Expected Trial Start Date*</li> <li>Expected Trial Duration (Working Days)*</li> </ul>
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<p>4.</p>	<p><b>Adding Trial and Purchase Items</b></p> <p>a. Add relevant Trial and Purchase Items or Trial Items only by clicking the appropriate Catalogue button:</p> <div style="display: flex; justify-content: space-around; margin-bottom: 10px;"> <span>LIST TRIAL ITEMS CATALOGUE</span> <span>NON LIST TRIAL ITEMS CATALOGUE</span> <span>NON CATALOGUE TRIAL ITEMS</span> <span>ADD ACCESSORIES</span> </div> <div style="display: flex; justify-content: space-around;"> <span>LIST ITEMS CATALOGUE</span> <span>NON LIST ITEMS CATALOGUE</span> <span>NON CATALOGUE ITEMS</span> <span>ADD ACCESSORIES</span> </div> <p>b. Click <span>PROCEED TO NEXT STEP</span></p> <p><b>Note:</b> Sometimes the item does not appear immediately in the grid after adding it in the catalogue. Please continue with the process and use “Preview and Edit” function (Step 7a) at the end to review items.</p>				
<p>5.</p>	<p><b>Add Supporting Documents</b></p> <p>a. Add relevant documents by clicking the appropriate button:</p> <div style="display: flex; justify-content: space-around; margin-bottom: 10px;"> <span>ATTACH ASSESSMENT REPORT</span> <span>ATTACH QUOTE</span> <span>+ ADD FILES</span> </div> <p>b. Click <span>PROCEED TO NEXT STEP</span></p> <p><b>Note:</b> Please note it can take a few minutes to upload the document. Please click on the Refresh button if you cannot see your document.</p>				
<p>6.</p>	<p><b>In the Delivery Address page, complete required fields:</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Section</th> <th>Check-box</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;">Delivery Address</td> <td> <ul style="list-style-type: none"> <li>• The customer’s primary address is selected by default  <input checked="" type="checkbox"/> <a href="#">Use Existing Customer Primary Address</a></li> <li>• To change the address from the Customer Primary Address, tick one of the other options: <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Use Assessor’s Address</a></li> <li><input type="checkbox"/> <a href="#">Use Alternate Customer Address</a></li> <li><input type="checkbox"/> <a href="#">Search Address Finder for Delivery</a></li> </ul> </li> </ul> <p><b>Note:</b></p> <p>Recommend you use Alternate Customer Address, click  and select address from lookup list</p> <p><b>Note:</b></p> <p>Recommend you use Search Address Finder for Delivery, enter address in <a href="#">Address Finder - start typing address here</a> field</p> </td> </tr> </tbody> </table>	Section	Check-box	Delivery Address	<ul style="list-style-type: none"> <li>• The customer’s primary address is selected by default  <input checked="" type="checkbox"/> <a href="#">Use Existing Customer Primary Address</a></li> <li>• To change the address from the Customer Primary Address, tick one of the other options: <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Use Assessor’s Address</a></li> <li><input type="checkbox"/> <a href="#">Use Alternate Customer Address</a></li> <li><input type="checkbox"/> <a href="#">Search Address Finder for Delivery</a></li> </ul> </li> </ul> <p><b>Note:</b></p> <p>Recommend you use Alternate Customer Address, click  and select address from lookup list</p> <p><b>Note:</b></p> <p>Recommend you use Search Address Finder for Delivery, enter address in <a href="#">Address Finder - start typing address here</a> field</p>
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		<p>To save the address as the Customer's primary address, tick <input type="checkbox"/> <a href="#">Save searched address as customer primary</a></p> <p><b>Note:</b> If an address cannot be found or needs to be modified, click <input type="checkbox"/> <a href="#">Edit Address</a> and populate the required fields Address Line 1* and Suburb*</p>		
	<p>Delivery Contact</p>	<ul style="list-style-type: none"> <li>• Tick one of the options: <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Use Customer Details</a></li> <li><input type="checkbox"/> <a href="#">Use Assessor Details</a></li> <li><input type="checkbox"/> <a href="#">Use Alternative Contact Details</a></li> <li><input type="checkbox"/> <a href="#">Add Other Details</a></li> </ul> </li> <li>• Enter optional fields and required delivery fields if not auto-populated <ul style="list-style-type: none"> <li>○ Delivery Contact Name*</li> <li>○ Delivery Contact Telephone*</li> <li>○ Special Delivery Instructions</li> <li>○ Special notes for equipment delivery</li> </ul> </li> </ul>		
		<ul style="list-style-type: none"> <li>• Click <input type="button" value="PROCEED TO NEXT STEP"/></li> </ul>		
<p>7.</p>	<p><b>Submit Application</b></p> <p>The following message displays:</p> <p><b>Great! Your Application is saved and completed. Would you like to</b></p> <ol style="list-style-type: none"> <li>a. Preview and Edit the Application, click <input type="button" value="PREVIEW AND EDIT"/></li> <li>b. Close and Park the Application, click <input type="button" value="CLOSE AND PARK"/></li> <li>c. Submit the Application, click <input type="button" value="SUBMIT"/></li> <li>d. Click <input type="button" value="SUBMIT"/> to accept the privacy declaration</li> </ol> <p><b>Note:</b> After submission, a full summary overview will display titled Edit Application. The Application will have status <b>Pending Approval</b> and will be assigned to Accessable as current owner.</p> <p><b>Note:</b> You can exit this view by selecting one of the options from the top green navigation bar (e.g. Application) depending on what you would like to do next.</p>			