



## Create Equipment – MOH Trial and Purchase or Trial Service Request



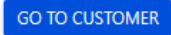
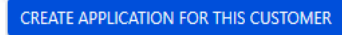

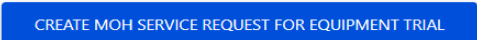
Complete the Equipment MOH EMS Assessor Section if required and retrieve the Rationale into aSAP.



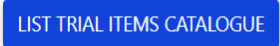



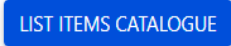
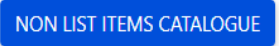



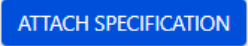
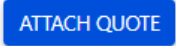
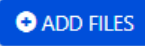

**Note:** It is possible to create a Service Request first in aSAP and then link the Assessor Section to the created Service Request. See [Link EMS Rationale to a draft Service Request within aSAP](#)

The following types of Equipment Trial Service Requests can be created:

Service Request Type	Service Request Sub Type
Equipment	Trial and Purchase Trial
<b>Completed steps:</b> <ol style="list-style-type: none"> <li>The Assessor has assessed the Customer, completed MOH Mandatory EMS Advice if required and is ready to submit a Service Request to Accessable.</li> <li>Customer Profile in aSAP is reviewed and is updated where applicable.</li> <li>Assessor has already completed EMS Portal documentation and has Customer NHI 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 <b>Applications</b></li> <li>Click <i>Service Requests (MOH Assessor)</i></li> <li>Click <b>CREATE SERVICE REQUEST</b></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 <b>Customers</b></li> <li>Click <i>Find a Customer</i></li> <li>Enter one of the following: <ul style="list-style-type: none"> <li>Option 1: NHI (recommended)</li> <li>Option 3: Birth Date (DD/MM/YYYY) and Last Name</li> </ul> </li> <li>Click <b>FIND CUSTOMER</b></li> </ol> <p><b>or</b></p> <p><b>Option 3: My Customers</b></p> <ol style="list-style-type: none"> <li>Click <b>Customers</b></li> <li>Click <i>My Customers</i></li> <li>Click <b>▼</b> for the Customer, and click <i>Create Application</i></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 a Service Request, go to <a href="#">How to Search and Create a Customer profile in aSAP</a></li> <li>To Create a Customer Only, go to <a href="#">How to Search and Create a Customer profile in aSAP</a></li> </ul> <p>If the Customer is found during the search</p> <ul style="list-style-type: none"> <li>To create a Service Request for an existing aSAP Customer, go to <a href="#">Step 2</a></li> </ul>								
<p><b>2.</b></p>	<p><b>Create a Service Request 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  to verify and confirm this Customer  <b>Note:</b> Click  to complete another Customer search</li> <li>To edit a Customer's details, click . The Edit Customer page displays</li> <li>To create a Service Request, click  and go to <a href="#">Step 3</a></li> </ol>								
<p><b>3.</b></p>	<p><b>Select the type of Service Request required and confirm Customer and Service Request Details</b></p> <ol style="list-style-type: none"> <li>Click the relevant button for the type of Service Request to be created    </li> <li>In the Confirmation of Customer and Service Request Details page, enter required fields marked with an asterisk which have not auto-populated:</li> </ol> <table border="1" data-bbox="264 1144 1366 1944"> <thead> <tr> <th data-bbox="264 1144 663 1200">Section</th> <th data-bbox="663 1144 1366 1200">Enter required fields</th> </tr> </thead> <tbody> <tr> <td data-bbox="264 1200 663 1749">Personal Information</td> <td data-bbox="663 1200 1366 1749"> <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>Ethnicity*</li> <li>Primary Disability Type*</li> <li>Type of Home*</li> <li>Residency Status*</li> <li>Funding Type*. Select from drop-down list: Disability Support Service or LTSCHC  <b>Note:</b> If Funding Type is LTSCHC, enter required fields LTSCHC Start Date* and LTSCHC Reason*</li> </ul> </td> </tr> <tr> <td data-bbox="264 1749 663 1850">Customer Contact Information</td> <td data-bbox="663 1749 1366 1850"> <ul style="list-style-type: none"> <li>Phone Number (recommended)</li> <li>Email (recommended)</li> </ul> </td> </tr> <tr> <td data-bbox="264 1850 663 1944">Customer Primary Address</td> <td data-bbox="663 1850 1366 1944"> <ul style="list-style-type: none"> <li>Primary DHB*</li> <li>Territorial Authority*</li> </ul> </td> </tr> </tbody> </table>	Section	Enter required fields	Personal Information	<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>Ethnicity*</li> <li>Primary Disability Type*</li> <li>Type of Home*</li> <li>Residency Status*</li> <li>Funding Type*. Select from drop-down list: Disability Support Service or LTSCHC  <b>Note:</b> If Funding Type is LTSCHC, enter required fields LTSCHC Start Date* and LTSCHC Reason*</li> </ul>	Customer Contact Information	<ul style="list-style-type: none"> <li>Phone Number (recommended)</li> <li>Email (recommended)</li> </ul>	Customer Primary Address	<ul style="list-style-type: none"> <li>Primary DHB*</li> <li>Territorial Authority*</li> </ul>
Section	Enter required fields								
Personal Information	<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>Ethnicity*</li> <li>Primary Disability Type*</li> <li>Type of Home*</li> <li>Residency Status*</li> <li>Funding Type*. Select from drop-down list: Disability Support Service or LTSCHC  <b>Note:</b> If Funding Type is LTSCHC, enter required fields LTSCHC Start Date* and LTSCHC Reason*</li> </ul>								
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Customer Primary Address	<ul style="list-style-type: none"> <li>Primary DHB*</li> <li>Territorial Authority*</li> </ul>								

		<p><b>Note:</b> If an auto-populated Primary DHB or Territorial Authority needs to be changed, click  and select from the lookup list</p>	
	Safety Risks	<p>If required, enter Safety Risks details:</p> <ul style="list-style-type: none"> <li>• Safety Risk Type. Select from drop-down list</li> <li>• Safety Risk Description</li> </ul>	
	Application Information	<ul style="list-style-type: none"> <li>• Application Sub Type* <b>Note:</b> Trial Service Requests are populated as <b>Trial</b></li> <li>• EMS Funding Criteria*. Select from drop-down list</li> <li>• Portal Session</li> <li>• Expected Trial Start Date*</li> <li>• Expected Trial Duration (Working Days)*</li> </ul>	
<p>c. Click </p> <p><b>Note:</b> When Processing is complete, the Service Request number is created and displays</p>			
<p><b>4.</b></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></span> <span></span> <span></span> <span></span> </div> <div style="display: flex; justify-content: space-around; margin-bottom: 10px;"> <span></span> <span></span> <span></span> <span></span> </div> <p>b. Click </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><b>5.</b></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></span> <span></span> <span></span> </div> <p>b. Click </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>		

6.

**In the Delivery Address page, complete required fields:**

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> </ul> <p><b>Note:</b> Address Line 1* and Suburb* are required fields</p> <ul style="list-style-type: none"> <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> <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></p> <p>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>
Delivery Contact	<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><input type="radio"/> Delivery Contact Name*</li> <li><input type="radio"/> Delivery Contact Telephone*</li> <li><input type="radio"/> Special Delivery Instructions</li> <li><input type="radio"/> Special notes for equipment delivery</li> </ul> </li> </ul>

- Click [PROCEED TO NEXT STEP](#)

7.

### Submit Service Request

The following message displays:

**Great! Your Application is saved and completed. Would you like to**

- a. Preview and Edit the Service Request, click **PREVIEW AND EDIT**
- b. Close and Park the Service Request, click **CLOSE AND PARK**
- c. Submit the Service Request, click **SUBMIT**
- d. Click **SUBMIT** to accept the privacy declaration

**Note:** After submission, a full summary overview will display titled Edit Service Request. The Service Request will have status **Pending Approval** and will be assigned to Accessable as current owner.

**Note:** 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.