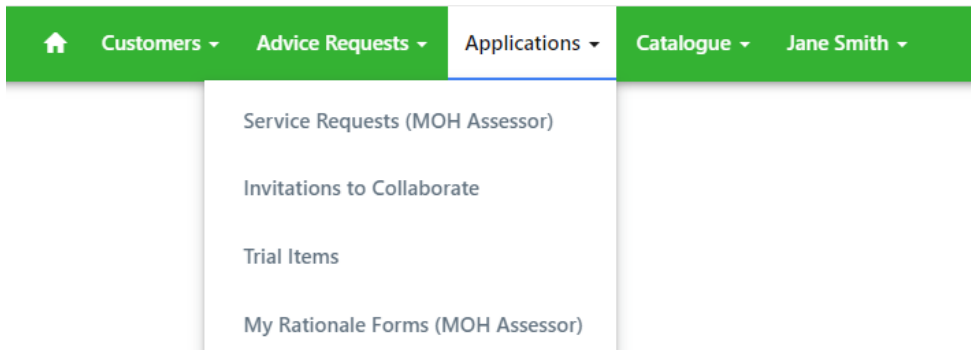




## Submitting a Band 1, 3, catalogue or non list equipment service request – how to guide

This document provides a guide on submitting a Band 2, 3 or non catalogue equipment service request.

This information is also available as a [video tutorial](#).






### 1. Select client

Step	Description
1.1	<p>You are required to go through the EMS portal and submit a P1 form for all service requests other than Band 1.</p> <p>Some service requests will require Advice. Go to XXXX to learn more.</p>
1.2	Go to the home page of the aSAP portal
1.3	<p>Select applications and then service requests from the drop down.</p> 
1.4	<p>Select 'create service request'</p> 
1.5	<p>Find the client by either:</p> <ol style="list-style-type: none"> <li>1. Entering NHI, or</li> <li>2. Entering birth date AND last name</li> </ol>
1.6	<p>Select 'find customer'</p> 
1.7	If the client is correct, select 'select customer', if not, search again.

	<div> <div>SEARCH AGAIN</div> <div>SELECT CUSTOMER</div> </div>
1.8	<p>Select 'create application for this client'</p> <p>If you need to update the client details, select 'go to customer. Details on how to create and update a client record are provided XXXXX</p> <div> <div>GO TO CUSTOMER</div> <div>CREATE APPLICATION FOR THIS CUSTOMER</div> </div>

## 2. Create Service Request

Step	Description
2.1	<p>Select 'create MOH Advice request'</p> <div> <div>CREATE MOH SERVICE REQUEST FOR EQUIPMENT PURCHASE NEW OR REFURBISHED</div> <div>CREATE MOH SERVICE REQUEST FOR EQUIPMENT TRIAL &amp; PURCHASE</div> <div>CREATE MOH SERVICE REQUEST FOR HOUSING</div> <div>CREATE MOH SERVICE REQUEST FOR VEHICLE</div> <div>CREATE MOH ADVICE REQUEST</div> </div>
2.2	<p>Make sure personal, contact and address information is complete and accurate. You can make amendments as required.</p>
2.3	<p>Select 'save and next'</p> <div> <div>SAVE AND NEXT</div> </div>
2.4	<p>Check client and details are correct (these will flow through from the previous screen. When this is done, you can close that section by hovering your mouse to the right of the section name (in this case 'general'), and clicking the arrow that appears.</p>

	<h2>Confirmation of Customer and Application Details</h2> <h3>Personal Information </h3> <p>You can do this for each section.</p>
2.5	<p>Enter application sub type by clicking the search icon.</p> <p><b>Application Sub Type *</b></p> <div> <input type="text" value="Purchase"/>  </div> <p>This will be 'purchase'. (Band 1 items cannot be trialled).</p>
2.6	<p>If there is a Service Request linked to this Advice, you can select this by clicking on the search icon.</p> <div> <input type="text" value="Link Service Request if Applicable"/>  </div> <p><b>Clinical Profile Information</b></p>
2.7	<p>Select the EMS funding criteria from the drop down for which you are making this application.</p> <p><b>EMS Funding Criteria *</b></p> <div> <input type="text" value="Select"/>  </div>
2.8	<p>For Band 2, 3, catalogue and non-list you will have created a request in the EMS Portal.</p> <p>Select that request using the search button.</p> <div> <input type="text" value="Portal Session"/>  </div>
	Select 'save and next'

	<div data-bbox="450 226 692 291">SAVE AND NEXT</div> <p>If mandatory fields are missing data, a message will display at the top of the page.</p>
2.9	<p>As with other screens, you can close that section by hovering your mouse to the right of the section name (in this case 'application summary')</p> <p>The application number and client name will display.</p> <p>If this is for a like-for-like replacement item, select YES.</p> <p><b>Like for Like Replacement</b></p> <p><input checked="" type="radio"/> No <input type="radio"/> Yes</p>
2.10	<p>If this item is for consignment stock to be delivered to the hospital, select 'YES'. Otherwise, leave blank or select 'NO'.</p> <p>If you select 'YES', equipment will be delivered to the hospital, not to the client and will be to replace an item already provided.</p> <p><b>Direct Issue Stock Replacement</b></p> <div data-bbox="418 1200 1275 1272"> <div>Select</div> <div>▼</div> </div>
2.11	<p>Select address to be deliver to:</p> <p>If you select 'use Assessor's address', the item will be delivered to the address we have on file for you.</p> <p>If you want to deliver to an address that is not an address we have on file, search address finder:</p> <div data-bbox="411 1583 1243 1872"> <p><b>Delivery Address</b></p> <div> <input type="checkbox"/> Use Existing Customer Primary Address           <input type="checkbox"/> Use Assessor's Address           <input type="checkbox"/> Use Alternate Customer Address           <input checked="" type="checkbox"/> Search Address Finder for Delivery         </div> <div> <p>Address Finder - start typing address here</p> <input type="text"/> </div> <div> <input type="checkbox"/> Edit Address           <input type="checkbox"/> Save searched address as customer primary         </div> <div> <p><b>Property Ownership</b></p> <div>Select</div> <div>▼</div> </div> </div> <p>Check the address shown is correct.</p> <p>You can save this new address as the customer's primary address.</p>


2.12	<p>Select who the contact (for this delivery) is.</p> <p>Select predefined delivery instructions by clicking the drop down on 'special delivery instructions'.</p> <p>To add free form delivery notes enter these in the 'special notes for equipment delivery':</p> <p><b>Special Delivery Instructions</b></p> <div> <div>Select</div> <div>▼</div> </div> <p><b>Special notes for equipment delivery</b></p> <div></div>
2.13	<p>Select 'save and next'</p> <div> <div>SAVE AND NEXT</div> </div>

### 3. Enter service request details


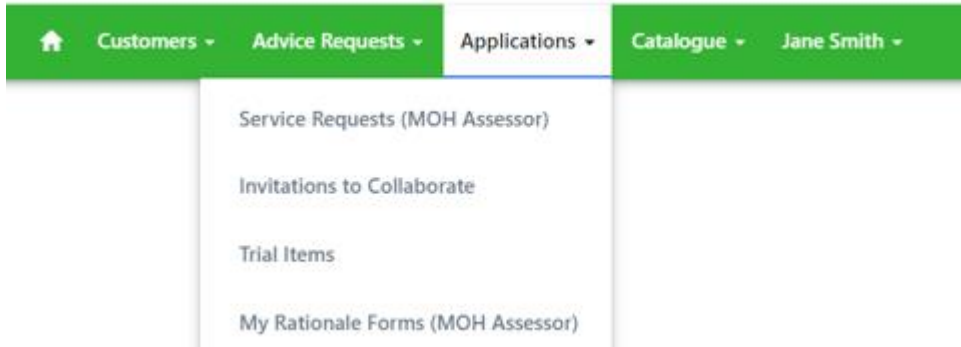
Step	Description
3.1	<p>Data from the previous screen will show in the general and details sections.</p> <p>Select equipment in the catalogue items section</p> <p>Catalogue Items</p> <div> <div> <div>Catalogue Product ↑</div> <div>Supplier</div> <div>Supplier Product Code</div> <div>Price Payable After Discount</div> </div> <div>There are no records to display.</div> </div>
3.2	<p>There are three ways to select equipment – select from list, select from catalogue or create a non catalogue item.</p> <p>For details on how to select equipment, go to XXXX</p> <p>For Band equipment, it is quickest to use 'add list equipment'. If you are selecting from the catalogue, select 'add equipment from full catalogue.'</p>

	<div data-bbox="331 237 679 309" data-label="Text"> <p>ADD LIST EQUIPMENT</p> </div> <div data-bbox="702 237 1318 309" data-label="Text"> <p>ADD EQUIPMENT FROM FULL CATALOGUE</p> </div> <p>If you are creating a write in item (one that isn't in the Band or catalogue', select 'add non catalogue item'</p> <div data-bbox="346 477 778 548" data-label="Text"> <p>ADD NON CATALOGUE ITEM</p> </div>
3.4	<p>If you have selected 'band list equipment, clicking on 'select band filter' and then checking the Band you require, and click 'apply'</p> <div data-bbox="296 710 671 1238" data-label="Form"> <div data-bbox="308 714 671 777" data-label="Text"> <p>SELECT BAND FILTER</p> </div> <div data-bbox="331 824 528 869" data-label="Text"> <p><input type="checkbox"/> Band 1 List</p> </div> <div data-bbox="331 947 528 992" data-label="Text"> <p><input checked="" type="checkbox"/> Band 2 List</p> </div> <div data-bbox="331 1070 528 1115" data-label="Text"> <p><input checked="" type="checkbox"/> Band 3 List</p> </div> <div data-bbox="331 1167 647 1238" data-label="Text"> <p>Apply</p> </div> </div> <p>You will then only be presented with equipment items on the selected Bands.</p>
3.4	<p>If you have selected 'add equipment from catalogue', the Band selection above will be available to select from.</p> <p>You can also key in:</p> <p>SIC code (Accessible item code),  Supplier code,  Search by supplier,  Or by product name search.</p> <p>If you select product name search, you should enter one key word into box 1, and/or one key word into box 2. E.g. if you want to select a Karma wheelchair, enter as below.</p>

	<div data-bbox="301 197 1479 383"> <div>BAND SELECTION</div> <div> <input type="checkbox"/> Refurb <div>SIC code</div> <div>Supplier Code</div> <div>Search By Supplier</div> </div> <div> <div>Product Name Search:</div> <div>Karma</div> <div>Wheelchair</div> </div> </div> <p>Selecting refurb is not required, as refurb or new is selected when processing occurs at Accessable.</p> <p>Alternatively, you can use the categories on the left. For more information on using the catalogue, go to XXXXX</p>
3.6	<p>If you have selected ‘add non catalogue item’</p> <p>You will be prompted to enter the equipment information. It is essential that all the information is entered so we can create the item and full track and service it.</p> <p>All the information you need will be on the supplier quote.</p> <p>Enter:</p> <ul style="list-style-type: none"> <li>• <b>Product name</b></li> <li>• <b>Supplier name</b> – search for the supplier. If supplier is not in the list, you can add it in the field below:</li> </ul> <div data-bbox="301 1064 1479 1283"> <div>Supplier</div> <div> <div></div> <div></div> <div></div> </div> <div>Supplier Name *</div> </div> <p>If supplier not found in search please type here</p> <ul style="list-style-type: none"> <li>• <b>Product type</b> – this should be base product, accessories, or package (e.g. essential for discharge package)</li> <li>• <b>Supplier product code</b> – this will be on the quote</li> <li>• <b>Product classification level 1 and 2</b> – click on the search icon and choose from the options, e.g.</li> </ul>

	<div>Lookup records</div> <div><div>Choose one record and click Select to continue</div><div><div>✓</div><div>Classification - Level 1 ↑</div></div><div><div><input type="checkbox"/></div><div>Access Equipment</div></div><div><div><input type="checkbox"/></div><div>Bathroom and Toilet</div></div><div><div><input type="checkbox"/></div><div>Bedroom</div></div><div><div><input type="checkbox"/></div><div>Communication Assistive Technology</div></div><div><div><input type="checkbox"/></div><div>Exercise Play and Therapy</div></div><div><div><input type="checkbox"/></div><div>Hearing Assistive Technology (HAT)</div></div><div><div><input type="checkbox"/></div><div>Hire</div></div><div><div><input type="checkbox"/></div><div>Kitchen, Dining, Living, Household Management</div></div><div><div><input type="checkbox"/></div><div>Medical and Respiratory Equipment</div></div><div><div><input type="checkbox"/></div><div>Mobility</div></div></div> <div><div>1</div><div>2</div><div>&gt;</div></div> <div><ul style="list-style-type: none"><li>• <b>URL to product</b> – if one is available</li><li>• <b>Supplier quote</b> – the quote number</li><li>• <b>Product description</b> – a short description telling us what the product is. You can use the description on the quote.</li></ul></div>												
3.6	<div>When you have selected all the required items, click ‘continue application’</div> <div><div><div> VIEW ITEMS ADDED</div><div>CONTINUE APPLICATION</div></div></div> <div>You will be returned to the previous screen.</div>												
3.7	<div>The items you have selected will be shown at the bottom of this screen</div> <div>Catalogue Items</div> <div><table><tr><th>Catalogue Product ↑</th><th>Supplier</th><th>Supplier Product Code</th><th>Price Payable After Discount</th></tr><tr><td><a href="#">Absolute 16inx16in Foam Cushion</a></td><td>Invacare New Zealand</td><td>EC66</td><td>\$196.65</td></tr><tr><td><a href="#">Action 1R Transit 16x17.5 Wheelchair</a></td><td>Invacare New Zealand</td><td>DK1640990</td><td>\$299.00</td></tr></table></div> <div>You can add additional items if required.</div>	Catalogue Product ↑	Supplier	Supplier Product Code	Price Payable After Discount	<a href="#">Absolute 16inx16in Foam Cushion</a>	Invacare New Zealand	EC66	\$196.65	<a href="#">Action 1R Transit 16x17.5 Wheelchair</a>	Invacare New Zealand	DK1640990	\$299.00
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3.8	Click proceed to next step at bottom of page.												
3.9	Upload the EMS propriety 1 form. Use the Add files button to add other supporting documents, such as quote and spec form (if required).												



	<div><div>ADD EMS PRIORITY 1 FORM</div><div> ADD FILES</div></div>																
3.10	Click ‘proceed to next step’																
3.11	Check that the delivery address and instructions are correct.																
3.12	<p>You can save the service request by clicking ‘save service request’ and the bottom of the page.</p> <p>If you are ready to submit the service request, go to the top of the page and select ‘submit service request’.</p> <p>Once you do this, the service request cannot be amended.</p> <div><div>SUBMIT SERVICE REQUEST</div></div> <p>You will be asked to declare the information is correct.</p>																
3.13	Click ‘proceed to next step’																
3.10	<p>To view your applications, select service requests from the applications drop down at the top of the screen:</p> <div></div>																
3.11	<p>The service request you have just created will be at the top. Check it says ‘pending approval’. If it doesn’t, you have not submitted the request, and it will not be processed.</p> <div><table><tr><th>Application Number</th><th>Application Type</th><th>Application Sub Type</th><th>Customer</th><th>Assessor</th><th>Status</th><th>Current Owner</th><th>Date Submitted</th></tr><tr><td>APP088052</td><td>Equipment</td><td>Purchase</td><td>John Doe</td><td>Jane Smith</td><td>Pending Approval</td><td>Accessible CS</td><td>07/10/2024 1:05 PM</td></tr></table></div>	Application Number	Application Type	Application Sub Type	Customer	Assessor	Status	Current Owner	Date Submitted	APP088052	Equipment	Purchase	John Doe	Jane Smith	Pending Approval	Accessible CS	07/10/2024 1:05 PM
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