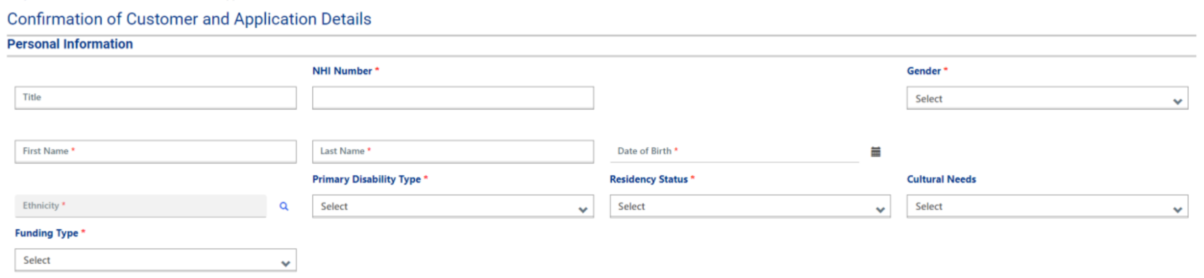
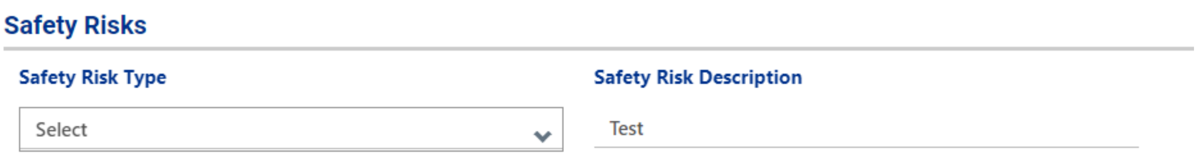
Create and update a client record – how to guide

This document provides a guide on creating and updating a client record. This information is also available as a video tutorial.

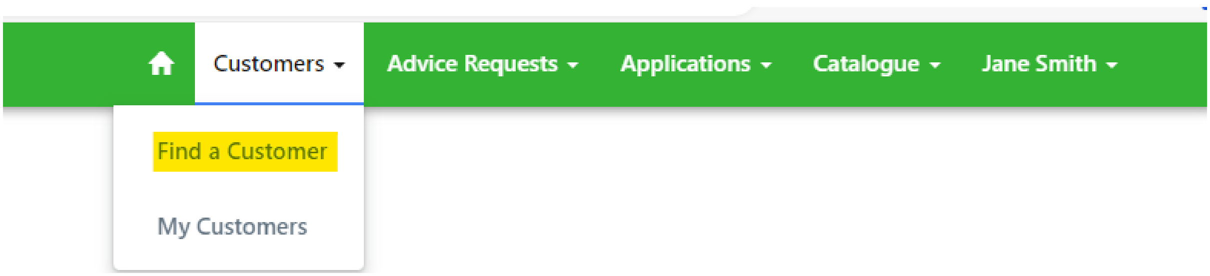
1. Create new client record

Step	Description
1.1	Go to the home page of the aSAP portal
1.2	If you are creating an application for a new client, you will need to create the client first. Select the type of application (service or advice request) you want to create from the main menu. Information on creating service and advice requests is available on our website: aSAP resources and information
1.3	Once you have selected the type of request you will be asked to enter the client. search for the client first to ensure they have not had EMS funding prior. You can do this by: 1. Entering NHI, or 2. Entering birth date AND last name Select 'find customer'
1.4	If this is a new client that has not had EMS funding before, no client record will be found, and you will have the option to create customer and application. 
1.5	Select the type of application from the blue boxes on the left.
1.6	You will be asked to fill in client personal information as below

	 Fields marked with an asterisk are mandatory **Please ensure you have entered an email address for either the client or key contact.** We use this for communication of non urgent information. You will need to enter the funding type (DSS or LTSCHC) and the primary disability type as this is recorded on the client record and not just the application.
1.7	Enter the primary address details by using the address finder. This ensures the address is in the correct format. 
1.8	Enter contact information. There must be at least one contact in either customer contact or key contact. You can enter data in both, but it is the key contact that will be contacted if needed. **Customer contact** is for the client. **Key contact** is someone the client prefers you contact, rather than themselves, for instance if the client is a child, you might put parent details into key contact.
1.9	If there are safety concerns we need to be aware of, you can enter these by either clicking the search item (it may have been used before), or entering straight into the description field. 
2.0	Enter the application information and click save and next. You can then go ahead and create your application.

2. Update a client record

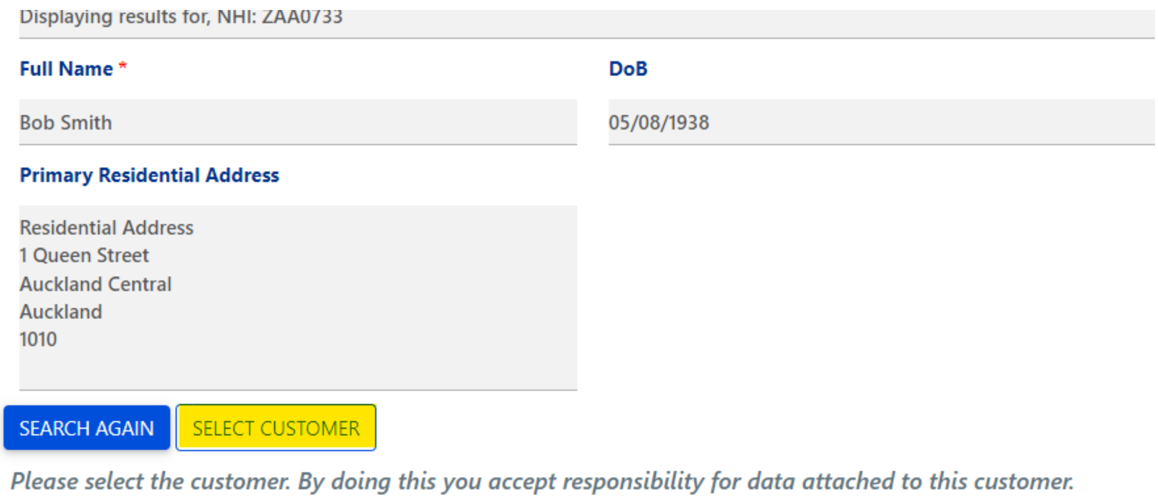
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>2.1</td><td>To update a client record, from the home page select ‘find a customer’.



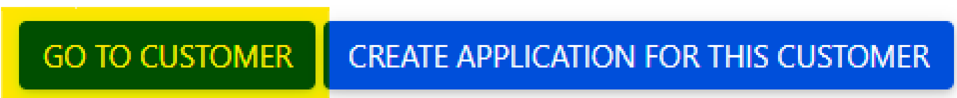
</td></tr>
<tr><td>2.2</td><td>Locate the client record by:

1. Entering NHI, or
2. Entering birth date AND last name

Select ‘find customer’</td></tr>
<tr><td>2.3</td><td>If the correct client shows, select ‘select customer’



If not, you can search again.</td></tr>
<tr><td>2.4</td><td>Select ‘go to customer’



</td></tr>
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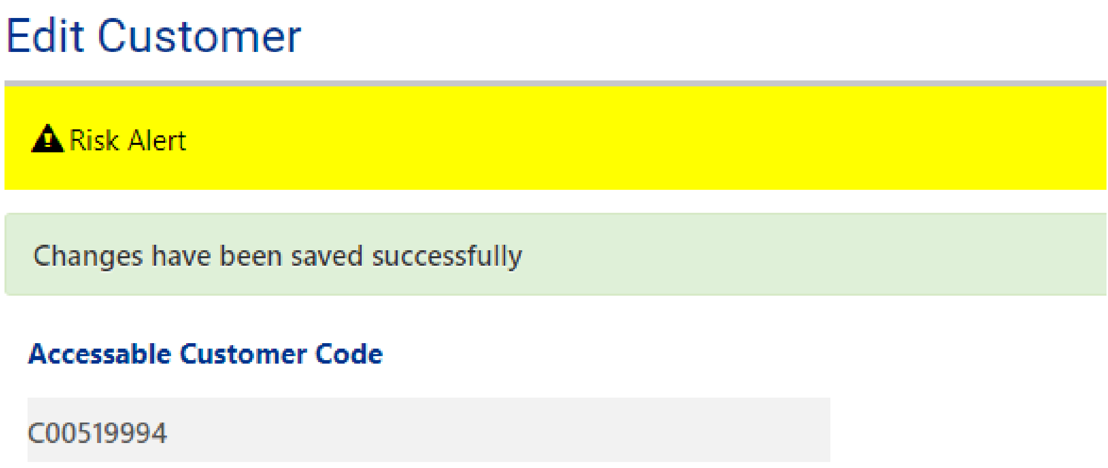
<tr><td>2.5</td><td>You can now edit the data as required.

You can also use this screen to view all the client’s applications as these show after the client’s data.</td></tr>
<tr><td>2.6</td><td>When you have made the required changes, go to the very bottom of the screen and select ‘save customer’

If mandatory fields are missing data, a message will display at the top of the page.</td></tr>
<tr><td>2.6</td><td>The screen will refresh and show ‘changes have been made successfully’ in green.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