

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 <u>video tutorial</u>.

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: <u>aSAP resources</u> <u>and information</u>
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
	2. Entering bitti 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.
	with have the option to create customer and application.
	SEARCH AGAIN CREATE CUSTOMER AND APPLICATION
1.5	Select the type of application from the blue boxes on the left.
1.0	
1.6	You will be asked to fill in client personal information as below
1.4 1.5 1.6	 I. Entering NHI, or 2. Entering birth date AND last name Select 'find customer' 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. SEARCH AGAIN CREATE CUSTOMER AND APPLICATION Select the type of application from the blue boxes on the left. You will be asked to fill in client personal information as below

	Confirmation of Customer and App	lication Details				
		NHI Number *			Gender *	
	Title				Select	*
	First Name *	Last Name *	Date of Birth *	=		
		Primary Disability Type *	Residency Status *		Cultural Needs	
	Ethnicity *	Q Select	✓ Select	*	Select	~
	Funding Type *					
1.7	Fields marked with an Please ensure you ha this for communication You will need to enter recorded on the clien Enter the primary add correct format. Customer Primary	n asterisk are mandator ave entered an email a on of non urgent inform r the funding type (DSS t record and not just th dress details by using th y Address - please use ac	y address for either t nation. or LTSCHC) and the e application. ne address finder. Th ddress finder	e primary o	or key contact disability type a s the address is	t. We use as this is
	Address Finder - star	t typing address here				
1.8	Enter contact informa	ation.				
	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 somed client is a child, you n	one the client prefers yc night put parent details	ou contact, rather th into key contact.	an thems	elves, for insta	nce if the
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. Safety Risks					
	Safety Risk Type		Safety Risk Descrip	tion		
			• • • • • • • • • • • • • • • • •			
	Select		✓ Test			
2.0	Enter the application application.	information and click s	ave and next. You c	an then go	ahead and cre	eate your

2. Update a client record

Step	Description					
2.1	To update a client record, from the home page select 'find a customer'.					
	↑ Customers •	Advice Requests 🗸	Applications -	Catalogue 🗕	Jane Smith 🗕	
	Find a Customer					
	wy customers					
2.2	Locate the client record by:					
	 Entering NHI, or Entering birth date AND last name 					
	Select 'find customer'					
2.3	If the correct client shows, sel	ect 'select custome	r'			
	Displaying results for, NHI: ZAA0	733				
	Full Name *		DoB			
	Bob Smith		05/08/1938			
	Primary Residential Address					
	Residential Address 1 Queen Street Auckland Central Auckland 1010					
	SEARCH AGAIN SELECT CUST	DMER				
	Please select the customer. By doing this you accept responsibility for data attached to this customer.					
	lf not, you can search again.					
2.4	Select 'go to customer'					
	GO TO CUSTOMER	CREATE APPLICA	TION FOR THIS	CUSTOMER		

2.5	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.
2.6	When you have made the required changes, go to the very bottom of the screen and select 'save customer'
	Goto Save
	SAVE CUSTOMER
	If mandatory fields are missing data, a message will display at the top of the page.
2.6	The screen will refresh and show 'changes have been made successfully' in green.
	Edit Customer
	Risk Alert
	Changes have been saved successfully
	Accessable Customer Code
	C00519994