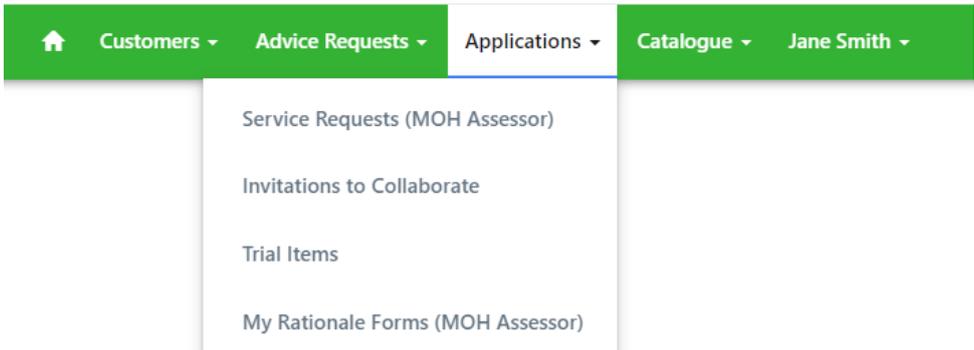


Create a trial and purchase Service Request – how to guide

This document provides a guide creating a trial and purchase Service Request
 This information is also available as a [video tutorial](#).

Band 1 and 2 items are not available for trial.

1. Select client

Step	Description
1.1	<p>You are required to go through the EMS portal and submit a P1 form for all Equipment Service Requests except for Band 1.</p> <p>Some equipment items will require Advice. Go to the advice resources on our website 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"> 1. Entering NHI, or 2. Entering birth date AND last name
1.6	<p>Select 'find customer'</p> 
1.7	If the client is correct, select 'select customer', if not, search again.

	<div style="display: flex; gap: 10px;"> <div style="background-color: #0056b3; color: white; padding: 5px 15px; border-radius: 5px;">SEARCH AGAIN</div> <div style="border: 1px solid #0056b3; padding: 5px 15px; border-radius: 5px;">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 style="display: flex; gap: 10px; margin-top: 20px;"> <div style="background-color: #0056b3; color: white; padding: 5px 15px; border-radius: 5px;">GO TO CUSTOMER</div> <div style="background-color: #0056b3; color: white; padding: 5px 15px; border-radius: 5px;">CREATE APPLICATION FOR THIS CUSTOMER</div> </div>

2. Create Service Request

Step	Description
2.1	<p>Select 'create MOH Advice request'</p> <div style="margin-top: 20px;"> <div style="background-color: #0056b3; color: white; padding: 5px 15px; border-radius: 5px; margin-bottom: 5px;">CREATE MOH SERVICE REQUEST FOR EQUIPMENT PURCHASE NEW OR REFURBISHED</div> <div style="background-color: #0056b3; color: white; padding: 5px 15px; border-radius: 5px; margin-bottom: 5px; border: 2px solid yellow;">CREATE MOH SERVICE REQUEST FOR EQUIPMENT TRIAL & PURCHASE</div> <div style="background-color: #0056b3; color: white; padding: 5px 15px; border-radius: 5px; margin-bottom: 5px;">CREATE MOH SERVICE REQUEST FOR HOUSING</div> <div style="background-color: #0056b3; color: white; padding: 5px 15px; border-radius: 5px; margin-bottom: 5px;">CREATE MOH SERVICE REQUEST FOR VEHICLE</div> <div style="background-color: #0056b3; color: white; padding: 5px 15px; border-radius: 5px;">CREATE MOH ADVICE REQUEST</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> <p style="color: #0056b3; font-weight: bold; margin-top: 10px;">Confirmation of Customer and Application Details</p> <p style="color: #0056b3; font-weight: bold; margin-top: 5px;">Personal Information </p> <p style="margin-top: 20px;">You can do this for each section.</p>

2.5	<p>Application subtype will default to trial.</p> <hr/> <p>Application Sub Type *</p> <p>Trial </p>
2.4	<p>Select the EMS funding criteria from the drop down for which you are making this application.</p> <p>EMS Funding Criteria *</p> <p>Select </p>
2.5	<p>Retrieve the rationale from the EMS Portal by clicking the search icon.</p> <p>Portal Session </p>
2.6	<p>Enter the expected trial start date, the expected trial duration will be 20 days. This is calculated from the expected trial start date.</p> <p>Expected Trial Start Date *  Expected Trial Duration (Working Days) *</p> <p>20</p>
2.7	<p>Select 'proceed to next step'</p> <p>PROCEED TO NEXT STEP</p> <p>If mandatory fields are missing data, a message will display at the top of the page.</p>
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>

	<p>Delivery Address</p> <p> <input type="checkbox"/> Use Existing Customer Primary Address Property Ownership <input type="checkbox"/> Use Assessor's Address <input type="text" value="Select"/> <input type="checkbox"/> Use Alternate Customer Address <input checked="" type="checkbox"/> Search Address Finder for Delivery </p> <p>Address Finder - start typing address here</p> <p> <input type="text" value=""/> <input type="checkbox"/> Edit Address <input type="checkbox"/> Save searched address as customer primary </p> <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>Special Delivery Instructions</p> <p><input type="text" value="Select"/></p> <p>Special notes for equipment delivery</p> <p><input type="text"/></p>
2.13	<p>Select 'save and next'</p> <p><input type="button" value="SAVE AND NEXT"/></p>

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>You can select both items AND items for purchase on this screen.</p> <p>The process is the same for both.</p>
3.2	<p>There are four ways to select equipment – select from list, select from catalogue, create a non catalogue item, or create accessories.</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.

If you are creating a write in item (one that isn't in the Band or catalogue', select 'add non catalogue item'.

If you are creating accessory items, select 'add accessories'

LIST TRIAL ITEMS CATALOGUE

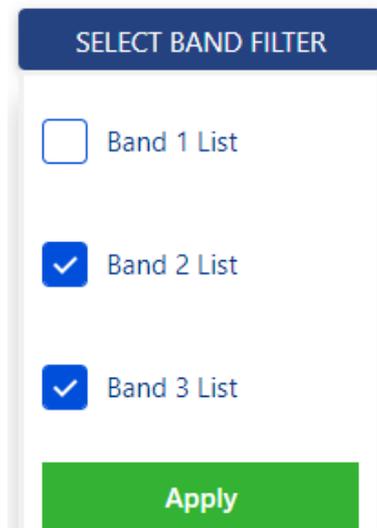
NON LIST TRIAL ITEMS CATALOGUE

NON CATALOGUE TRIAL ITEMS

ADD ACCESSORIES

3.3

If you have selected 'list items catalogue', click on 'select band filter' and then checking the Band you require, and click 'apply'



SELECT BAND FILTER

Band 1 List

Band 2 List

Band 3 List

Apply

You will then only be presented with equipment items on the selected Bands.

3.4

If you have selected 'non list trial items catalogue', the Band selection above will be available to select from.

You can also key in:

SIC code (Accessible item code),

Supplier code,

Search by supplier,

Or by product name search.

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.

BAND SELECTION

Refurb

SIC code

Supplier Code

Search By Supplier

Product Name Search:

Karma

Wheelchair

Selecting refurb is not required, as refurb or new is selected when processing occurs at Accessable.

Alternatively, you can use the categories on the left. For more information on using the catalogue, go to XXXXX

3.5 If you have selected 'add non catalogue item', or 'add accessories'

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.

All the information you need will be on the supplier quote.

Enter:

- **Product name**
- **Supplier name** – search for the supplier. If supplier is not in the list, you can add it in the field below:

Supplier

If supplier not found in search please type here

- **Product type** – this should be base product, accessories, or package (e.g. essential for discharge package)
- **Supplier product code** – this will be on the quote
- **Product classification level 1 and 2** – click on the search icon and choose from the options, e.g.

Lookup records

Choose one record and click Select to continue

- Classification - Level 1 ↑**
- Access Equipment
- Bathroom and Toilet
- Bedroom
- Communication Assistive Technology
- Exercise Play and Therapy
- Hearing Assistive Technology (HAT)
- Hire
- Kitchen, Dining, Living, Household Management
- Medical and Respiratory Equipment
- Mobility



- **URL to product** – if one is available
- **Supplier quote** – the quote number
- **Product description** – a short description telling us what the product is. You can use the description on the quote.

3.6 When you have selected all the required items, click 'continue application'



You will be returned to the previous screen.

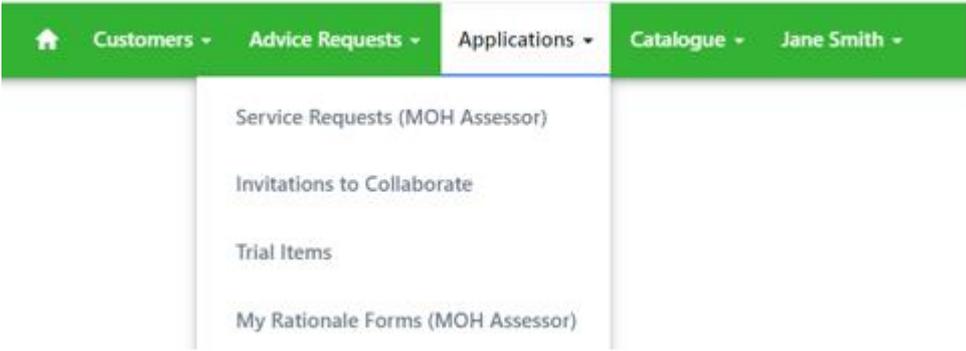
3.7 The items you have selected for trial will be shown in the 1st table, items selected for purchase will be shown in the bottom table.

Product Name ↑	Catalogue Level (Product Catalogue)	Supplier
3G Torque RWD with Tilt Wheelchair	Band 3	Invacare New Z

Note: sometimes the item does not appear in the grid after adding it in the catalogue. Do not add it again as the item is there,

Purchase Items

	<div data-bbox="331 241 1508 324" data-label="Table"> <table border="1"> <thead> <tr> <th>Product Name ↑</th> <th>Catalogue Level (Product Catalogue)</th> <th>Supplier</th> </tr> </thead> <tbody> <tr> <td>3G Torque RWD with Tilt Wheelchair</td> <td>Band 3</td> <td>Invacare New Zeala</td> </tr> </tbody> </table> </div> <p data-bbox="331 331 1508 362"><i>Note: sometimes the item does not appear in the grid after adding it in the catalogue. Do not add it again as the item is there just</i></p> <div data-bbox="336 443 584 495" data-label="Text"> <p>PROCEED TO NEXT STEP</p> </div> <p data-bbox="296 555 794 586">You can add additional items if required.</p>	Product Name ↑	Catalogue Level (Product Catalogue)	Supplier	3G Torque RWD with Tilt Wheelchair	Band 3	Invacare New Zeala		
Product Name ↑	Catalogue Level (Product Catalogue)	Supplier							
3G Torque RWD with Tilt Wheelchair	Band 3	Invacare New Zeala							
3.8	Click 'proceed to next step' (at bottom of page.).								
3.9	<p data-bbox="296 705 1460 772">Upload the EMS propriety 1 form. Use the Add files button to add other supporting documents, such as quote and spec form (if required).</p> <div data-bbox="327 846 997 913" data-label="Text"> <p>ADD EMS PRIORITY 1 FORM ADD FILES</p> </div> <p data-bbox="296 952 1276 985">You can select multiple files at one time by holding down the shift or ctrl button.</p>								
3.10	Click 'proceed to next step'								
3.11	<p data-bbox="296 1108 678 1137">Select address to be deliver to:</p> <p data-bbox="296 1176 1476 1249">If you select 'use Assessor's address', the item will be delivered to the address we have on file for you.</p> <p data-bbox="296 1288 1476 1321">If you want to deliver to an address that is not an address we have on file, search address finder:</p> <div data-bbox="311 1355 1141 1646" data-label="Form"> <p>Delivery Address</p> <table border="0"> <tr> <td><input type="checkbox"/> Use Existing Customer Primary Address</td> <td>Property Ownership</td> </tr> <tr> <td><input type="checkbox"/> Use Assessor's Address</td> <td><input type="text" value="Select"/></td> </tr> <tr> <td><input type="checkbox"/> Use Alternate Customer Address</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/> Search Address Finder for Delivery</td> <td></td> </tr> </table> <p>Address Finder - start typing address here</p> <p><input type="text"/></p> <p><input type="checkbox"/> Edit Address</p> <p><input type="checkbox"/> Save searched address as customer primary</p> </div> <p data-bbox="296 1691 742 1724">Check the address shown is correct.</p> <p data-bbox="296 1765 1109 1798">You can save this new address as the customer's primary address.</p>	<input type="checkbox"/> Use Existing Customer Primary Address	Property Ownership	<input type="checkbox"/> Use Assessor's Address	<input type="text" value="Select"/>	<input type="checkbox"/> Use Alternate Customer Address		<input checked="" type="checkbox"/> Search Address Finder for Delivery	
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3.12	<p data-bbox="296 1848 829 1881">Select who the contact (for this delivery) is.</p> <p data-bbox="296 1915 1508 1948">Select predefined delivery instructions by clicking the drop down on 'special delivery instructions'.</p> <p data-bbox="296 1989 1372 2022">To add free form delivery notes enter these in the 'special notes for equipment delivery':</p>								

	<p>Special Delivery Instructions</p> <p>Select ▼</p> <p style="background-color: yellow; padding: 2px;">Special notes for equipment delivery</p>
3.13	<p>Select 'proceed to next step'</p> <p style="text-align: center;">PROCEED TO NEXT STEP</p>
3.14	<p>You can now choose to preview and edit, close and come back to it, or submit.</p> <p>Once you submit, the service request cannot be amended.</p> <p style="text-align: center;"> PREVIEW AND EDIT CLOSE AND PARK SUBMIT </p> <p>You will be asked to declare the information is correct.</p>
3.15	<p>To view your application, select service requests from the applications drop down at the top of the screen:</p>  <p>The screenshot shows a green navigation bar with the following items: Home icon, Customers (dropdown), Advice Requests (dropdown), Applications (dropdown), Catalogue (dropdown), and Jane Smith (dropdown). The 'Applications' dropdown menu is open, showing the following options: Service Requests (MOH Assessor), Invitations to Collaborate, Trial Items, and My Rationale Forms (MOH Assessor).</p>
3.16	<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>

All Active Service Requests

Search...



Application Number	Application Type	Application Sub Type	Customer	Assessor	Status	Current Owner	Date Submitted	Assess
APP088093	Equipment	Trial	Bob Smith	Jane Smith	Pending Approval	Accessible CS	11/10/2024 11:31 AM	3870
APP088092	Equipment	Trial	Bob Smith	Jane Smith	Solution Build			3870
APP088091	Equipment	Trial	Bob Smith	Jane Smith	Trial In Progress	Accessible	11/10/2024 9:57 AM	4044
APP088090	Equipment	Trial	Bob Smith	Jane Smith	Trial In Progress	Accessible	10/10/2024 12:18 PM	4041