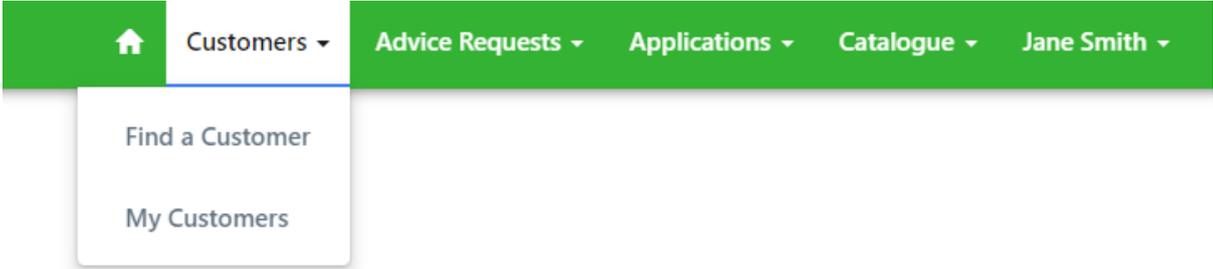
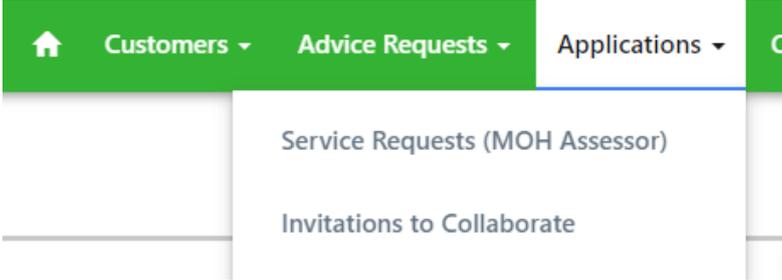


Update a trial outcome and add equipment to an existing trial Service Request – how to guide

This document provides a guide on updating the outcome of a trial and adding equipment to an existing trial.

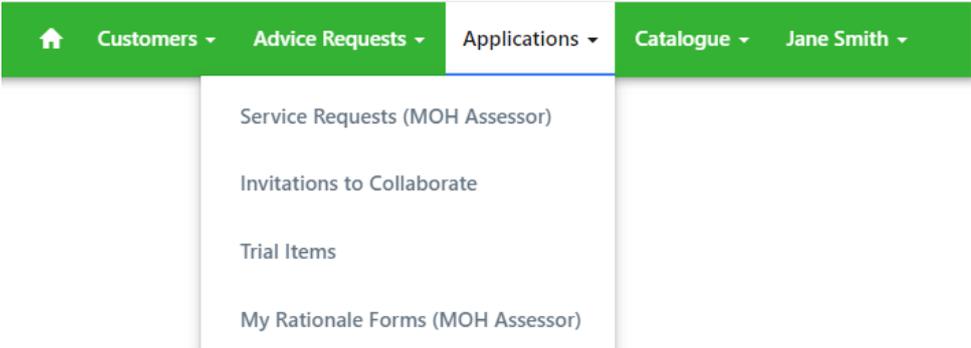
This information is also available as a [video tutorial](#).

1. Select Service Request to update

Step	Description
1.1	<p>You are required to go through the EMS portal and submit a P1 form for additional equipment added to an existing Trial Service Request, other than Band 1.</p> <p>Some items will require Advice. Go to when to submit an advice to learn more.</p> <p>Band 1 and 2 items are not available for trial.</p>
1.2	Go to the home page of the aSAP portal
1.3	<p>There are two ways of selecting the Service Request you want to update.</p> <ol style="list-style-type: none"> Select customers and choose ‘find a customer’ or ‘my customers’  <ol style="list-style-type: none"> Select applications and choose ‘Service Requests’  <p>You can search by application, number or client</p>

Search...  [CREATE SERVICE REQUEST](#)

1.3 Select applications and then service requests from the drop down.



1.4 Click the down arrow the left of the application you want to update and select update trial (flow)

Application Number	Application Type	Application Sub Type	Customer	Assessor	Status	Current Owner	Date Submitted	Assessor Section Id (Originated Portal)
APP088090	Equipment	Trial	Bob Smith	Jane Smith	Trial In Progress	Accessible	10/10/2024 12:18 PM	4041
APP088089	Equipment	Purchase	Bob Smith	Jane Smith	Solution Build			4043
APP088088	Equipment	Trial	Bob Smith	Jane Smith	Pending Approval	Accessible CS	10/10/2024 12:10 PM	4042
APP088085	Equipment	Trial	Bob Smith	Jane Smith	Failed Submission			4043
APP088077	Equipment	Trial	Bob Smith	Jane Smith	Pending Approval	Accessible CS	08/10/2024 4:25 PM	4044
APP088076	Equipment	Trial	Bob Smith	Jane Smith	Pending Approval	Accessible CS	08/10/2024 4:10 PM	4044

If the update trial (flow) option is not visible and the status is 'Trial in Progress', the Service Request has items pending approval from Accessable and is not editable at this time.

1.7 To add an additional item to trial or purchase,

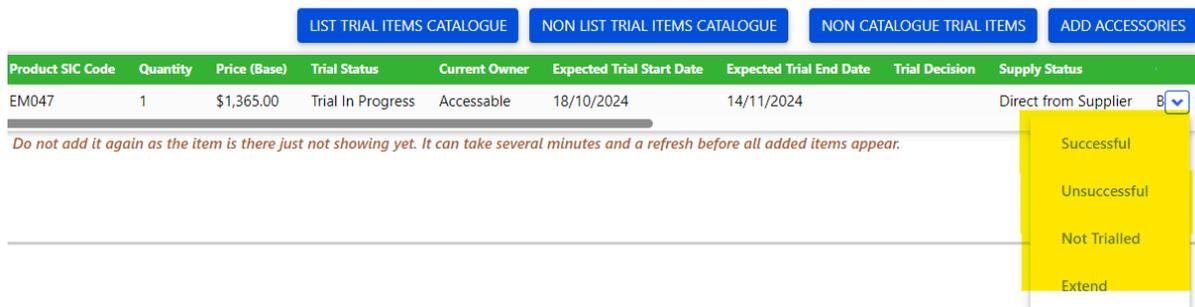
Step	Description
1.1	<p>You are required to go through the EMS portal and submit a P1 form for additional equipment added to an existing Trial Service Request, other than Band 1.</p> <p>Some items will require Advice. Go to when to submit an advice to learn more.</p> <p>Band 1 and 2 items are not available for trial.</p>

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If the update trial (flow) option is not visible and the status is 'Trial in Progress', the Service Request has items pending approval from Accessable and is not editable at this time.

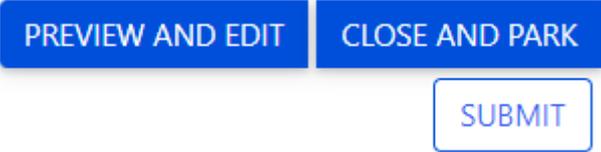
2. Update trial outcome

Step	Description
2.1	<p>To update the outcome,</p> <p>Click the down arrow on the item of equipment you want to update the outcome for and select from the drop down.</p>  <p>Complete this for each item you are update an outcome for.</p>

3. Add equipment items to trial

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> <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> <p>If you are creating a write in item (one that isn't in the Band or catalogue', select 'add non catalogue item'.</p> <p>If you are creating accessory items, select 'add accessories'</p>

	<div style="display: flex; justify-content: space-around; align-items: center;"> LIST TRIAL ITEMS CATALOGUE NON LIST TRIAL ITEMS CATALOGUE NON CATALOGUE TRIAL ITEMS ADD ACCESSORIES </div>
3.3	<p>If you have selected 'list items catalogue', click on 'select band filter' and then checking the Band you require, and click 'apply'</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="background-color: #0056b3; color: white; text-align: center; padding: 5px; margin-bottom: 10px;">SELECT BAND FILTER</div> <div style="margin-bottom: 10px;"> <input type="checkbox"/> Band 1 List </div> <div style="margin-bottom: 10px;"> <input checked="" type="checkbox"/> Band 2 List </div> <div style="margin-bottom: 10px;"> <input checked="" type="checkbox"/> Band 3 List </div> <div style="background-color: #00a651; color: white; text-align: center; padding: 10px; margin-top: 10px;">Apply</div> </div> <p>You will then only be presented with equipment items on the selected Bands.</p>
3.4	<p>If you have selected 'non list trial items 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 style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="background-color: #0056b3; color: white; text-align: center; padding: 5px; margin-bottom: 10px;">BAND SELECTION</div> <div style="display: flex; align-items: flex-start;"> <div style="margin-right: 20px;"> <input type="checkbox"/> Refurb </div> <div style="margin-right: 20px;"> <input style="width: 150px;" type="text" value="SIC code"/> </div> <div style="margin-right: 20px;"> <input style="width: 150px;" type="text" value="Supplier Code"/> </div> <div style="margin-right: 20px;"> <input style="width: 150px;" type="text" value="Search By Supplier"/> </div> <div style="margin-right: 20px;"> <p style="margin: 0;">Product Name Search:</p> <input style="width: 150px;" type="text" value="Karma"/> </div> <div> <input style="width: 150px;" type="text" value="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>When you have selected all the required items, click 'continue application'</p>  <p>You will be returned to the previous screen.</p>												
3.7	<p>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.</p> <table border="1" data-bbox="344 562 1509 645"> <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 Z</td> </tr> </tbody> </table> <p><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</i></p> <p>Purchase Items</p> <hr/> <table border="1" data-bbox="331 909 1509 992"> <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> <p><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> <p>PROCEED TO NEXT STEP</p> <p>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 Z	Product Name ↑	Catalogue Level (Product Catalogue)	Supplier	3G Torque RWD with Tilt Wheelchair	Band 3	Invacare New Zeala
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Product Name ↑	Catalogue Level (Product Catalogue)	Supplier											
3G Torque RWD with Tilt Wheelchair	Band 3	Invacare New Zeala											
3.8	<p>Click 'proceed to next step' (at bottom of page.).</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>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>												

3.15

To view your application, select service requests from the applications drop down at the top of the screen:

