

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	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.
	Some items will require Advice. Go to when to submit an advice to learn more.
	Band 1 and 2 items are not available for trial.
1.2	Go to the home page of the aSAP portal
1.3	There are two ways of selecting the Service Request you want to update.
	1. Select customers and choose 'find a customer' or 'my customers'
	★ Customers Advice Requests Applications Catalogue Jane Smith
	Find a Customer
	My Customers
	2. Select applications and choose 'Service Requests'
	★ Customers Advice Requests Applications C
	Service Requests (MOH Assessor)
	Invitations to Collaborate
	You can search by application, number or client

		:	Search			Q		CREATE SE	RVICE	REQUEST
						_				
12	Solocta	polication	s and thon s	onvico re	auosts f	rom tho d	rondow	2		
1.3	Select a	pplication	s and then se	ervice re	equests i	rom the di	rop dowr	1.		
	÷	Customers 🗸	Advice Reque	ests 🗸 🖌	Application	s 🗸 Catalo	gue - Ja	ane Smith -		
			Service Reques	sts (MOH A	Assessor)					
			Invitations to (ollaborate	9					
			invitations to c	conaborad						
			Trial Items							
			My Rationale F	orms (MO)H Assessor	r)				
14	Click the	e down arr	ow the left o	f the an	nlication	n vou want	to unda	te and select	tundat	e trial (flow)
1.1	Click th	e down an	ow the tert o	i the up	plication	r you want	. to upuu		upuu	
	Application Num	ber Application Typ	e Application Sub Type	Customer Bob Smith	Assessor	Status Trial In Progress	Current Owner	Date Submitted	Assessor Sec	tion Id (Originated Portal
	APP088090	Equipment	Purchase	Bob Smith	Jane Smith	Solution Build	Accessable	10/10/2024 12:10 PM	4043	G View details
	APP088088	Equipment	Trial	Bob Smith	Jane Smith	Pending Approval	Accessable CS	10/10/2024 12:10 PM	4042	▼
	APP088085	Equipment	Trial	Bob Smith	Jane Smith	Failed Submission		00/40/2024 4 25 014	4043	🖸 Edit 💽
	APP088077 APP088076	Equipment	Trial	Bob Smith Bob Smith	Jane Smith Jane Smith	Pending Approval Pending Approval	Accessable CS Accessable CS	08/10/2024 4:25 PM	4044 4044	Update Trial (Flow)
	lf tho ur	data trial (flow) option	visnotv	viciblo an	d the state	uc ic 'Trir	lin Prograss	, tha 9	Sonvico
	Request	t has items	pending app	proval fr	rom Acce	essable an	d is not e	ditable at th	is time	el vice
1.7 Sten	lo add a	an additior	hal item to tr	ial or pu	irchase,					
1.1	You are	required to	o go through	the EM	S portal	and subm	it a P1 fo	rm for additi	onal e	quipment
	added t	o an existir	ng Trial Servi	ice Requ	uest, oth	er than Ba	nd 1.			4
	Some it	ems will re	auire Advice	e. Go to y	when to	submit an	advice t	o learn more		
	-									
	Band 1	and 2 item	s are not ava	ilable fo	or trial.					
1.4	Click the	e down arr	ow the left o	f the ap	plicatior	n you want	to upda	te and select	t updat	e trial (flow)
	Application Num	ber Application Typ	e Application Sub Type	Customer	Assessor	Status	Current Owner	Date Submitted	Assessor Sec	tion Id (Originated Portal
	APP088090	Equipment	Trial	Bob Smith	Jane Smith	Trial In Progress	Accessable	10/10/2024 12:18 PM	4041	✓
	APP088089	Equipment	Purchase	Bob Smith	Jane Smith	Solution Build		40/40/2001 1	4043	View details
	APP088088	Equipment	Irial	Bob Smith	Jane Smith	Pending Approval	Accessable CS	10/10/2024 12:10 PM	4042	🗹 Edit
	APP088077	Equipment	Trial	Bob Smith	Jane Smith	Pending Approval	Accessable CS	08/10/2024 4:25 PM	4044	
	APP088076	Equipment	Trial	Bob Smith	Jane Smith	Pending Approval	Accessable 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.

2. Update trial outcome

Step	Descripti	on									
2.1	To update	e the o	utcome	,							
	Click the of from the o	down a drop d	arrow or own.	n the item o	of equipr	ment you want	to upda	ate the	outcome	for ar	nd select
	Product SIC Code	Quantity	Price (Base)	LIST TRIAL ITEMS	CATALOGUE	NON LIST TRIAL ITEMS CA	TALOGUE	NON CAT	ALOGUE TRIAL IT	TEMS A	
	EM047	1	\$1,365.00	Trial In Progress	Accessable	18/10/2024	14/11/2024			Direct fron	n Supplier B 👽 '
	Do not add it ago	in as the it	em is there jus	t not showing yet. I	lt can take sever	al minutes and a refresh be	efore all addec	l items appe	ar.	s	uccessful
										L	Jnsuccessful
										N	Not Trialled
										E	xtend
	Complete	this fo	or each i	tem you a	re update	e an outcome fo	or.				

3. Add equipment items to trial

Step	Description
3.1	Data from the previous screen will show in the general and details sections.
	You can select both items AND items for purchase on this screen.
	The process is the same for both.
3.2	There are four ways to select equipment – select from list, select from catalogue, create a non catalogue item, or create accessories.
	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 CATAL	OGUE NON LIST TRIAL ITEMS O	NON CATALOGUE	RIAL ITEMS ADD ACCESSORIES				
3.3	If you have selected you require, and clic	ʻlist items catalogue', clic k ʻapply'	k on 'select band filter' and	d then checking the Band				
	SELECT BAND	FILTER						
	Band 1 List							
	Band 2 List							
	Band 3 List							
	Apply							
	You will then only be	e presented with equipme	ent items on the selected B	ands.				
3.4	If you have selected select from.	'non list trial items catalc	gue', the Band selection a	bove will be available to				
	You can also key in:							
	SIC code (Accessable Supplier code, Search by supplier, Or by product name	e item code), search.						
	If you select product into box 2. E.g. if you	t name search, you should I want to select a Karma v	d enter one key word into b vheelchair, enter as below.	oox 1, and/or one key word				
	BAND SELECTIC	N						
	Refurb	SIC code	Supplier Code	Search By Supplier				
		Product Name Search:	Karma	Wheelchair				
	Selecting refurb is n	ot required, as refurb or n	ew is selected when proce	ssing occurs at Accessable.				
	Alternatively, you ca go to XXXXX	n use the categories on th	ne left. For more informatio	on on using the catalogue,				

3.6	When you have selected all the req	uired items, click 'continue application'				
	📜 VIEW ITEMS ADDED	CONTINUE APPLICATION				
	You will be returned to the previou	s screen.				
3.7	The items you have selected for tria be sown in the bottom table.	al will be shown in the 1 st table, items select	ted for purchase will			
	Product Name 🕇	Catalogue Level (Product Catalogue)	Supplier			
	3G Torque RWD with Tilt Wheelchair	Band 3	Invacare New Z			
	Note: sometimes the item does not appea	n in the grid after adding it in the catalogue. Do not add i	it again as the item is there J			
	Purchase Items					
	Product Name 🕇	Catalogue Level (Product Catalogue)	Supplier			
	3G Torque RWD with Tilt Wheelchair	Band 3	Invacare New Zeala			
	Note: sometimes the item does not appear i	n the gria after daalng it in the catalogue. Do not daa it a	gain as the item is there just			
	PROCEED TO NEXT STEP					
	You can add additional items if req	uired.				
3.8	Click 'proceed to next step' (at bott	com of page.).				
3 14	You can now choose to preview and	dedit close and come back to it or submit				
0.11						
	Once you submit, the service request cannot be amended.					
	PREVIEW AND EDIT CLOS					
		SUBMIT				
	You will be asked to declare the inf	ormation is correct.				
3.15	To view your application, select ser	rvice requests from the applications drop de	own at the top of the			
	screen:					
L						

1 Customer	s - Advice Req	uests - Applications -	Catalogue +	Jane Smith +		
	Service Requ	ests (MOH Assessor)				
	Invitations to	Collaborate				
	Trial Items					
	My Rationale	Forms (MOH Assessor)				
	n Custon	ers - Advice Requests	Applications	Catalogue +	Jane Smith +	
		Service Requests	(MOH Assessor)			
		Invitations to Col	aborate			