

## Submitting an EMS Advice Request – how to guide

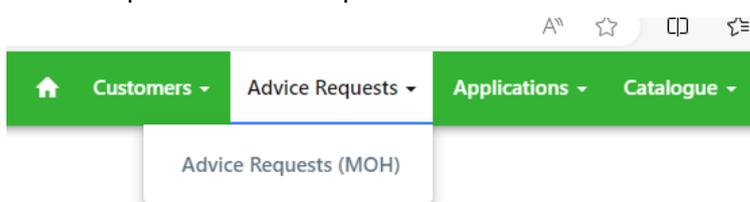
This document provides a guide on submitting an Advice Request. This information is also available as video tutorials.

[How to submit an equipment advice request video tutorial](#)

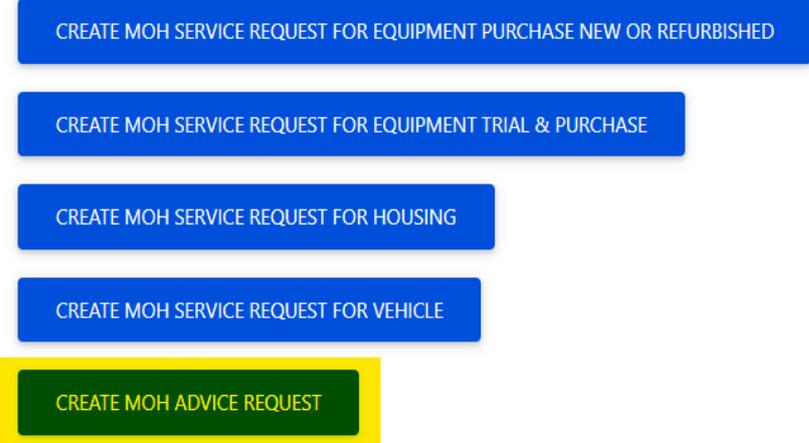
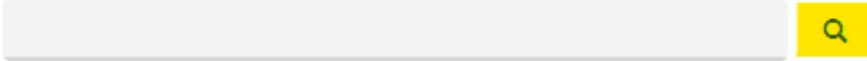
[How to submit a housing advice video tutorial](#)

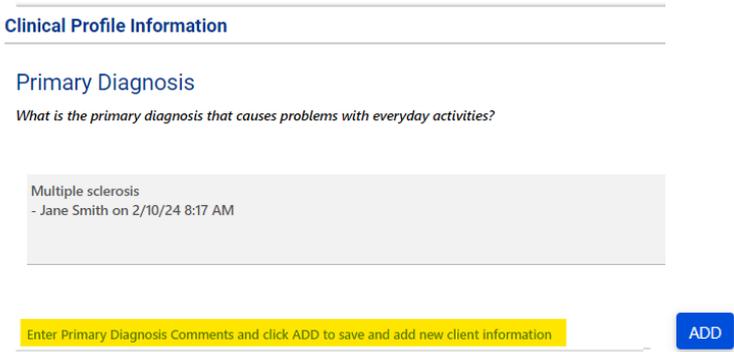
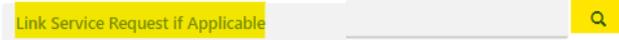
[How to submit a vehicle advice request](#)

### 1. Select client

Step	Description
1.1	Go to the home page of the aSAP portal
1.2	Select advice requests from the top menu 
1.3	Select 'create' 
1.4	Find the client by either: <ol style="list-style-type: none"> <li>1. Entering NHI, or</li> <li>2. Entering birth date AND last name</li> </ol>
1.5	Select 'find customer' 
1.6	If the client is correct, select 'select customer', if not, search again. 
1.7	Select 'create application for this client' 

### 2. Create advice

Step	Description
2.1	<p>Select 'create MOH Advice request'</p>  <p>CREATE MOH SERVICE REQUEST FOR EQUIPMENT PURCHASE NEW OR REFURBISHED</p> <p>CREATE MOH SERVICE REQUEST FOR EQUIPMENT TRIAL &amp; PURCHASE</p> <p>CREATE MOH SERVICE REQUEST FOR HOUSING</p> <p>CREATE MOH SERVICE REQUEST FOR VEHICLE</p> <p>CREATE MOH ADVICE REQUEST</p>
2.2	<p>Make sure personal, contact and address information is complete and accurate. You can make amendments as required.</p>
2.3	<p>Enter advice request summary. The summary is a brief title for your Advice, e.g. wheelchair and seating.</p> <hr/> <p><b>Advice Request Information</b></p> <hr/> <p>Advice Summary (e.g. Wheelchair and Seating, Bathroom Modifications) *</p>
2.4	<p>Enter the search icon on 'Advice Request Type'. This will bring up a drop down of options.</p> <p><b>Advice Request Type *</b></p> 
2.5	<p>The 'Reason for equipment request' field. Click on the arrow on the right hand side and select the reason you are submitting the advice.</p> <p><b>Reason For Equipment Request *</b></p> 
2.6	<p>Select 'save and next'</p> 

<p>2.7</p>	<p>Check client and Advice Request 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>You can do this for each section.</p>
<p>2.8</p>	<p>Enter Clinical Profile Information. If you have already created an Advice for this client, the information will have copied over.</p> <p>If anything needs to be changed or added, click in the row BELOW the information (highlighted) and click 'add'.</p> <p><b>If you do not click 'add', this information will not be saved.</b></p>  <p>Complete for remaining clinical profile information.</p>
<p>2.9</p>	<p>If there is a Service Request linked to this Advice, you can select this by clicking on the search icon.</p>  <p><b>Clinical Profile Information</b></p>
<p>2.10</p>	<p>Complete all fields in the Main Issues section. As above, enter into the field below and click 'add'.</p>
<p>2.11</p>	<p>Select 'save and next'</p> 

	If mandatory fields are missing data, a message will display at the top of the page.
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This completes the base data for an Advice. At this point, your Advice has not been saved or submitted. Now follow the steps below depending on the type of Advice (equipment, housing, vehicle or Access Clinic).

### 3. If your advice is for housing

Step	Description
3.1	In the 'main issues' section, describe the main issues/functional loss <b>related to this advice</b> . Remember each section can be closed by clicking the arrow to the right, in this case 'main issues'.
3.2	Advise if the client has challenging behaviours related to this request by selecting from the drop down box
3.3	Enter the criteria under which you are applying for this request from the drop down. E.g. 'mobility to and from the home'.  <div style="text-align: center;"> <p>Relevant EMS Funding Criteria</p> <p>Select</p> </div>
3.4	In the 'home features' section, describe the home's features and barriers. Make sure you do this for both External and Internal.
3.5	Enter who owns the property by selecting from the drop down list. E.g. Family Trust, Kāinga Ora, Rental etc., and how many years the client has lived in the property.  <div style="text-align: center;"> <p>Property Owned By</p> <p>Select</p> <p>How many years have they lived in this property?</p> </div>
3.6	Advise if the living situation is sustainable for 2-3 years, and if the house is suitable long term.  Describe the situation in the fields to the right.

	<p><b>Is the living/care situation sustainable for 2-3 years?</b> <span style="float: right;">Describe</span></p> <p><input checked="" type="radio"/> No/Unsure <input type="radio"/> Yes</p> <hr/> <p><b>Is the House Suitable Long Term?</b> <span style="float: right;">Describe</span></p> <p><input checked="" type="radio"/> No/Unsure <input type="radio"/> Yes</p> <hr/>
3.7	<p>Enter the proposed solutions, including alternatives considered, outcome to be achieved and any additional information to support the request.</p> <p>This should be detailed and ‘paint a picture’ of the client’s essential disability related need and all options that have been considered.</p> <p><b>Solutions</b></p> <hr/> <p>Proposed Solution (Internal Modifications)</p> <hr/> <p>Proposed Solution (External/Access Modification)</p> <hr/> <p>Alternative Options Considered/Tried</p> <hr/> <p>Outcome to be Achieved</p> <hr/> <p>Additional Information</p> <hr/> <p><b>Repeat Funding?</b></p> <p><input checked="" type="radio"/> No <input type="radio"/> Yes</p> <p>if yes, provide details</p> <p>For more information on what to include in a housing advice, including documents that must be attached, go to .</p>
3.8	Describe any cultural considerations that should be taken into account.
3.9	Attach any supporting documents.

3.10	<p>If your Advice is ready to be submitted, go to the top of the page on the right and click 'submit service request'</p> <div style="text-align: center; margin: 10px 0;">  </div> <p>At this point, the advice is submitted to Accessable and unable to be changed. The Advice will now show as 'awaiting PAT assignment'. It may not show automatically so refresh the screen.</p>
3.11	<p>If you want to save and come back to the Advice, go to the bottom of the screen on the left and click 'save as draft'</p> <div style="text-align: center; margin: 10px 0;">  </div>

## 4. If your advice is for equipment

Step	Description
3.1	<p>In the 'main issues' section, describe the main issues/functional loss <b>related to this advice</b>. Remember each section can be closed by clicking the arrow to the right, in this case 'main issues'.</p>
3.2	<p>Advise if the client has challenging behaviours related to this request by selecting from the drop down box</p>
3.3	<p>Enter the criteria under which you are applying for this request from the drop down. E.g. 'get around safely in the home'.</p> <div style="text-align: center; margin: 10px 0;">  </div>
3.4	<p>Enter the proposed solutions, including alternatives considered, outcome to be achieved and any additional information to support the request.</p> <p>This should be detailed and 'paint a picture' of the client's essential disability related need and all options that have been considered.</p> <div style="margin-top: 20px;"> <p><b>Solutions</b></p> <hr/> <p>Proposed Solution</p> <hr/> <p>Alternative Options Considered/Trialled</p> <hr/> </div>

	For more information on what to include in an advice, go to <a href="#">what to include in an advice</a> .
3.5	Describe any cultural considerations that should be taken into account.
3.6	Attach any supporting documents.
3.7	<p>If your Advice is ready to be submitted, go to the top of the page on the right and click 'submit service request'</p> <p style="text-align: center;"></p> <p>At this point, the advice is submitted to Accessable and unable to be changed. The Advice will now show as 'awaiting PAT assignment'. It may not show automatically so refresh the screen.</p>
3.8	<p>If you want to save and come back to the Advice, go to the bottom of the screen on the left and click 'save as draft'</p> <p style="text-align: center;"></p>

## 5. If your advice is for vehicle purchase or modification

Step	Description
3.1	In the 'main issues' section, describe the main issues/functional loss <b>related to this advice</b> . Remember each section can be closed by clicking the arrow to the right, in this case 'main issues'.
3.2	Advise if the client has challenging behaviours related to this request by selecting from the drop down box
3.3	Enter the criteria under which you are applying for this request from the drop down. E.g. 'mobility to and from the home'.

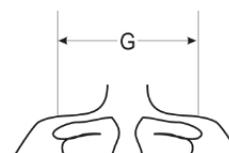
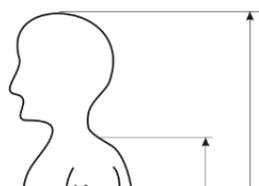
	<hr/> <p><b>Relevant EMS Funding Criteria</b></p> <hr/> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Select</div> <hr/>
3.4	<p>Enter the proposed solutions, including alternatives considered, outcome to be achieved and any additional information to support the request.</p> <p>This should be detailed and ‘paint a picture’ of the client’s essential disability related need and all options that have been considered.</p> <p><b>Solutions</b></p> <hr/> <p>Proposed Solution (Internal Modifications)</p> <hr/> <p>Proposed Solution (External/Access Modification)</p> <hr/> <p>Alternative Options Considered/Tried</p> <hr/> <p>Outcome to be Achieved</p> <hr/> <p>Additional Information</p> <hr/> <p><b>Repeat Funding?</b></p> <p><input checked="" type="radio"/> No <input type="radio"/> Yes</p> <p>if yes, provide details</p>
3.5	Describe any cultural considerations that should be taken into account.
3.6	Attach any supporting documents.
3.7	If your Advice is ready to be submitted, go to the top of the page on the right and click ‘submit service request’

	<div style="text-align: center; margin-bottom: 10px;">  </div> <p>At this point, the advice is submitted to Accessable and unable to be changed. The Advice will now show as 'awaiting PAT assignment'. It may not show automatically so refresh the screen.</p>
3.8	<p>If you want to save and come back to the Advice, go to the bottom of the screen on the left and click 'save as draft'</p> <div style="text-align: center; margin-top: 20px;">  </div>

## 6. If your advice is for Access Clinic

Step	Description
3.1	In the 'main issues' section, describe the main issues/functional loss <b>related to this advice</b> . Remember each section can be closed by clicking the arrow to the right, in this case 'main issues'.
3.2	Advise if the client has challenging behaviours related to this request by selecting from the drop down box
3.3	<p>Enter the criteria under which you are applying for this request from the drop down. E.g. 'mobility to and from the home'.</p> <div style="text-align: center; margin-top: 20px;">  </div>
3.4	<p>Describe the findings from the initial observations/assessment, current equipment and why the existing equipment is no longer suitable.</p> <div style="margin-top: 40px;"> <p><u>Findings from Initial Observations/Assessment (posture in sitting and lying)</u></p> <hr/> <p><u>Current Equipment (make, model, size of wheelchair, buggy, sleep system, bed, etc)</u></p> </div>

3.7	<p>Enter the proposed solutions, including alternatives considered, and the outcome to be achieved.</p> <p>This should be detailed and ‘paint a picture’ of the client’s essential disability related need and all options that have been considered.</p> <p><b>Solutions</b></p> <hr/> <p><b>Proposed Solution</b></p> <hr/> <p><b>Alternative Options Considered/Tried</b></p> <hr/> <p><b>Outcome to be Achieved</b></p> <hr/>
3.9	Describe any cultural considerations that should be taken into account.
3.10	<p>Advise what type of Access Clinic you are requesting.</p> <p><b>ACCESS Clinic</b></p> <p><input type="checkbox"/> <b>Wheeled Mobility/Seating</b></p> <p><input type="checkbox"/> <b>Postural Support/Lying</b></p> <p><input type="checkbox"/> <b>Other</b></p>
3.11	Advise the preferred, venue, date and time of the Clinic. And whether a hoist is required to be at the clinic.
3.12	Advise if the person’s home is wheelchair accessible.
3.13	<p>Enter body measurements, including the date they were taken.</p> <p>Date Body Measurement Taken _____</p>



	<p>For more information on what to include in a housing advice, including documents that must be attached, go to <a href="#">what-to-include-in-an-advice.pdf</a>.</p>
3.4	<p>If your Advice is ready to be submitted, go to the top of the page on the right and click 'submit service request'</p> <p></p> <p>At this point, the advice is submitted to Accessable and unable to be changed. The Advice will now show as 'awaiting PAT assignment'. It may not show automatically so refresh the screen.</p>
3.4	<p>If you want to save and come back to the Advice, go to the bottom of the screen on the left and click 'save as draft'</p> <p></p>