

## How to create a new case for the same patient

### A. Under MY Applications

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### Applications

You have created the following applications:

	Title	Date Created	Last Modified	% Complete	Status	
<a href="#">Edit</a>	TEST TEST	6/13/2018 11:40:51 AM	6/13/2018 11:40:51 AM	14%	In Progress	OPTIONS ▾
<a href="#">Edit</a>	TEST TEST	6/13/2018 11:57:54 AM	6/13/2018 11:57:54 AM	60%	In Progress	OPTIONS ▾

[ADD NEW APPLICATION](#)

You have been invited to view the following applications:

You have not been invited to view any applications.

### B. Find your Clients case

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### Applications

You have created the following applications:

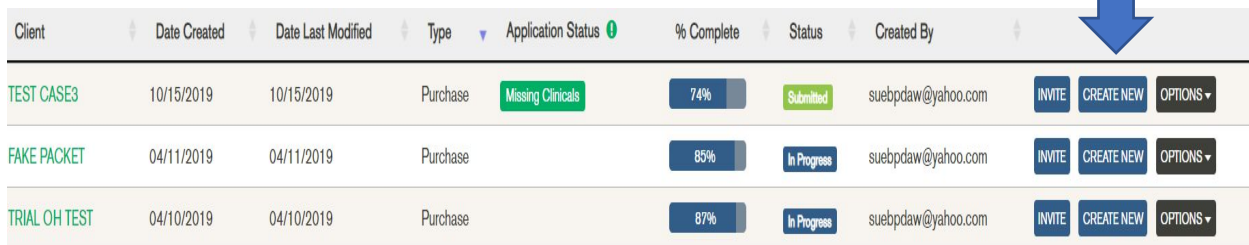
	Title	Date Created	Last Modified	% Complete	Status	
<a href="#">Edit</a>	TEST TEST	6/13/2018 11:40:51 AM	6/13/2018 11:40:51 AM	14%	In Progress	OPTIONS ▾
<a href="#">Edit</a>	TEST TEST	6/13/2018 11:57:54 AM	6/13/2018 11:57:54 AM	60%	In Progress	OPTIONS ▾

[ADD NEW APPLICATION](#)

You have been invited to view the following applications:

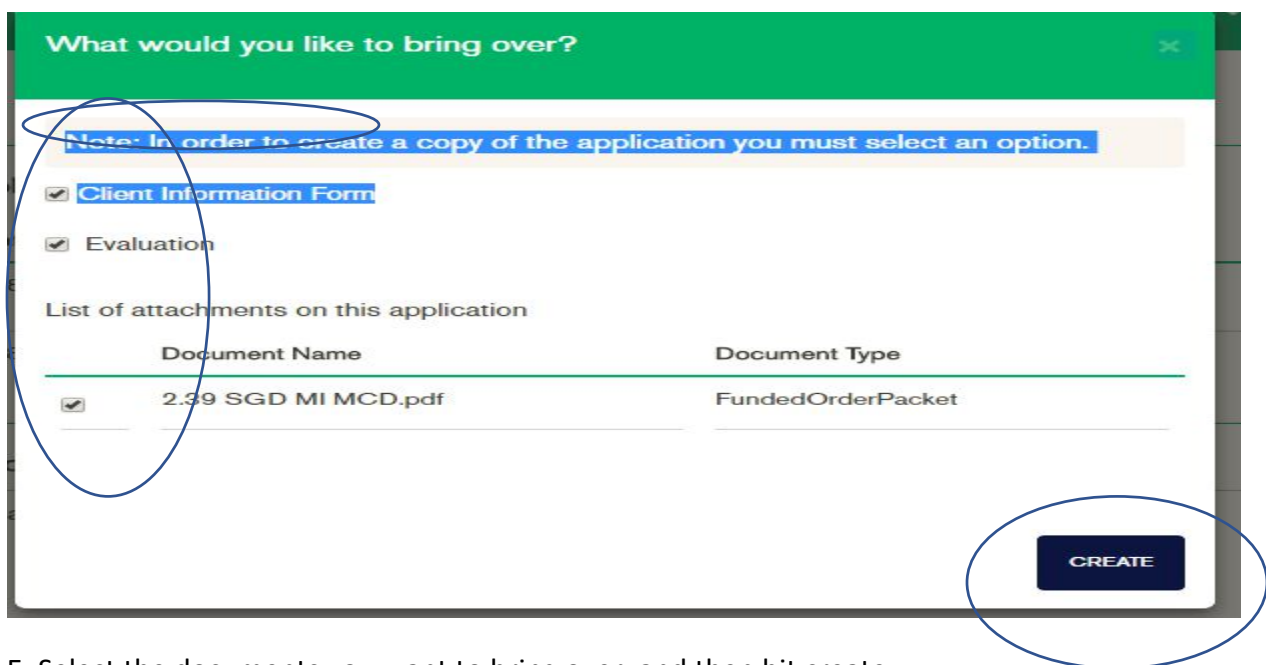
You have not been invited to view any applications.

C. On the right-hand side click “Create New”



Client	Date Created	Date Last Modified	Type	Application Status	% Complete	Status	Created By	
TEST CASE3	10/15/2019	10/15/2019	Purchase	Missing Clinicals	74%	Submitted	suebpdaw@yahoo.com	INVITE CREATE NEW OPTIONS
FAKE PACKET	04/11/2019	04/11/2019	Purchase		85%	In Progress	suebpdaw@yahoo.com	INVITE CREATE NEW OPTIONS
TRIAL OH TEST	04/10/2019	04/10/2019	Purchase		87%	In Progress	suebpdaw@yahoo.com	INVITE CREATE NEW OPTIONS

A prompt will appear. Then you must decide what you would like to bring over?



What would you like to bring over?

Note: In order to create a copy of the application you must select an option.

- Client Information Form
- Evaluation

List of attachments on this application

	Document Name	Document Type
<input checked="" type="checkbox"/>	2.59 SGD MI MCD.pdf	FundedOrderPacket

CREATE

E. Select the documents you want to bring over, and then hit create.

NOTE: If doing a device purchase after the trial, you do not need to bring over the trial agreement or any unsigned evaluations.

F. Once you click the create button, the application will appear for you to work on. If nothing has changed with the client’s demographic information, you can go directly to the Equipment Recommendation Tab

Client: FAKE PACKET

Save And Continue Later

Fields marked with an asterisk\* are required for the application to be complete (you can save your progress and return to enter the required fields later).

Purchase/Trial/Repair/Accessories\*  
Purchase

Speech Generating Device (SGD)\*  
EM-12 and Eyemobile Plus accessory

Please list accessories below

SLP EVAL 97%

FINAL STEPS 0%

Select up to one mount option

Wheelchair Mount\*  
 Yes  No

Table Mount\*  
 Yes  No

Floor Stand\*  
 Yes  No

Universal Mount\*  
 Yes  No

Previous Save And Continue Later Next

Spell check

G. To change the application to the new type you will need to update the Purchase/Trial/Repair/ Accessories section

1. If doing a device purchase you would use PURCHASE
2. If you need a repair to your speech generating device you would use REPAIR
3. If you need an accessory for your speech generating device you would use ACCESSORIES

E. Make sure that you hit Next (if continuing) or SAVE and Continue. It will change the new application to your new request that you need for this patient. Now you have your new application to process your new request for your client.