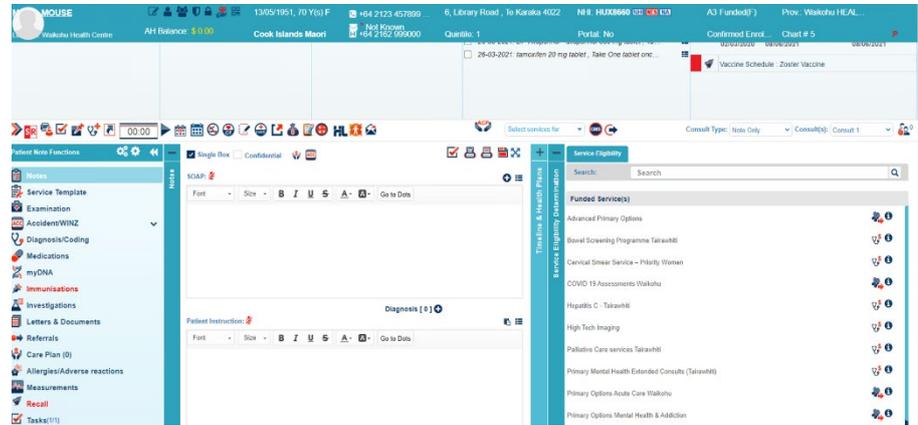
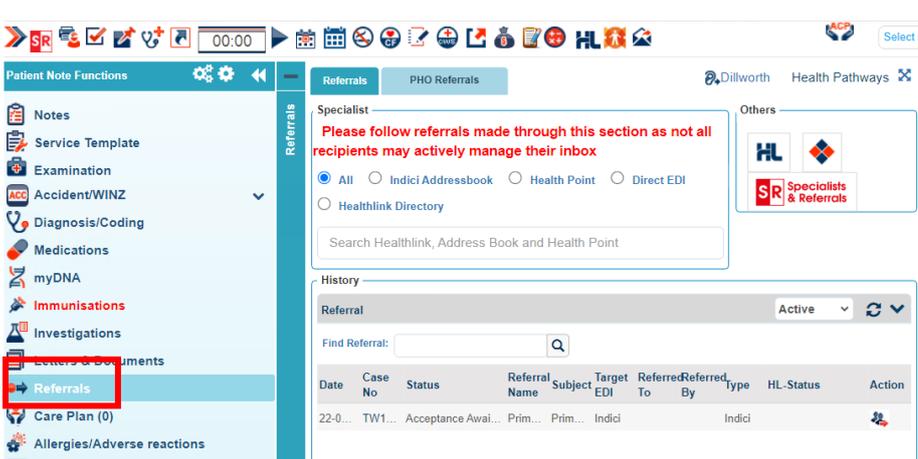
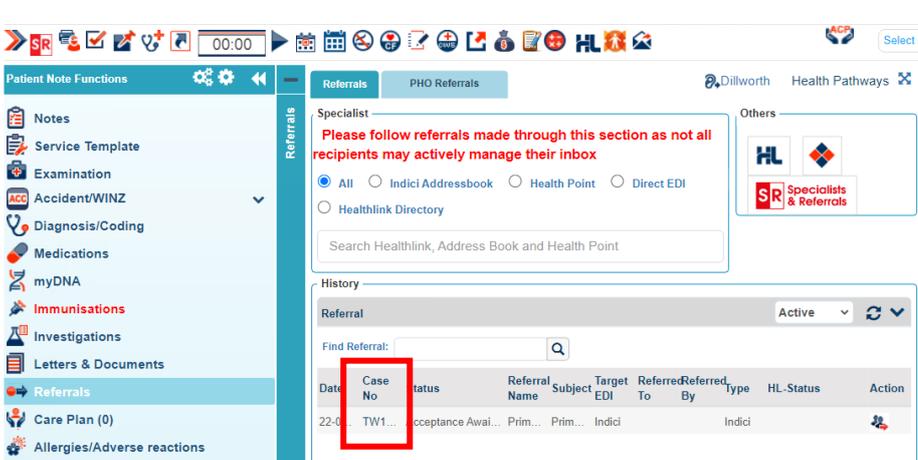
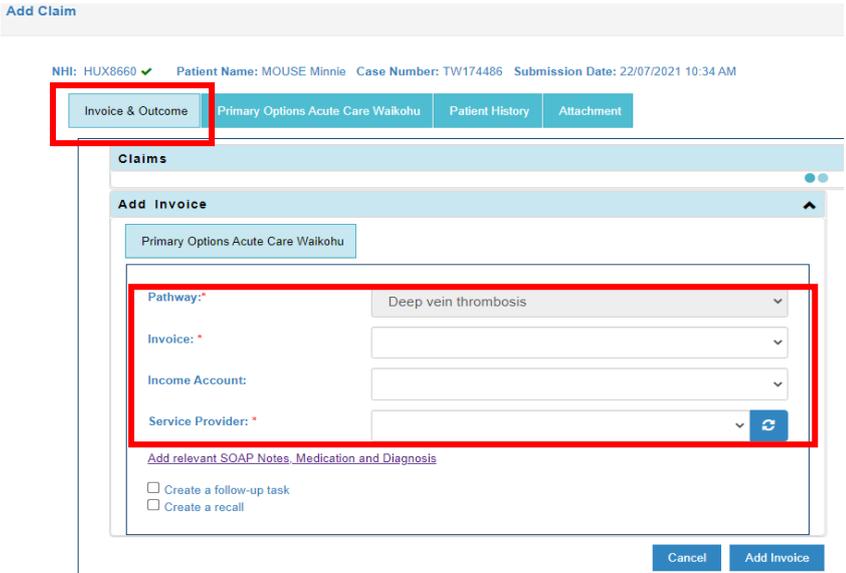
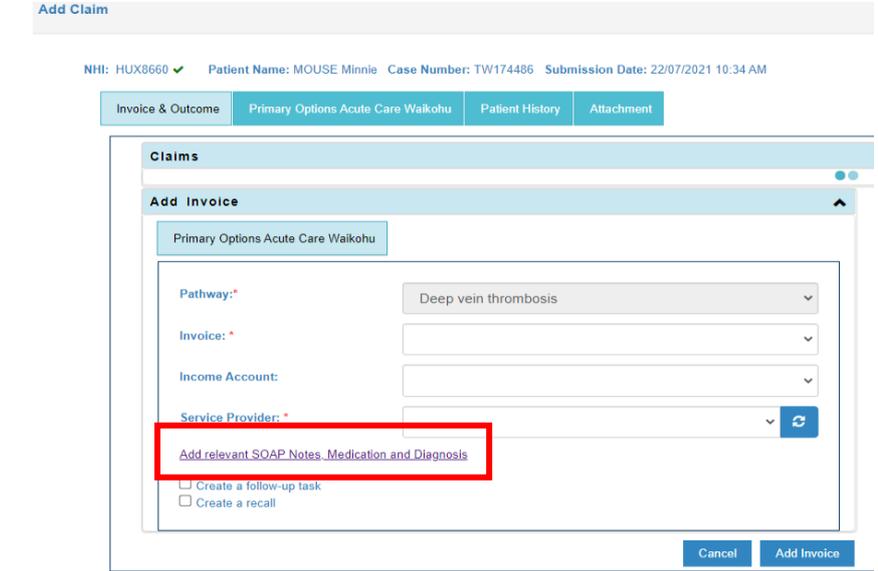
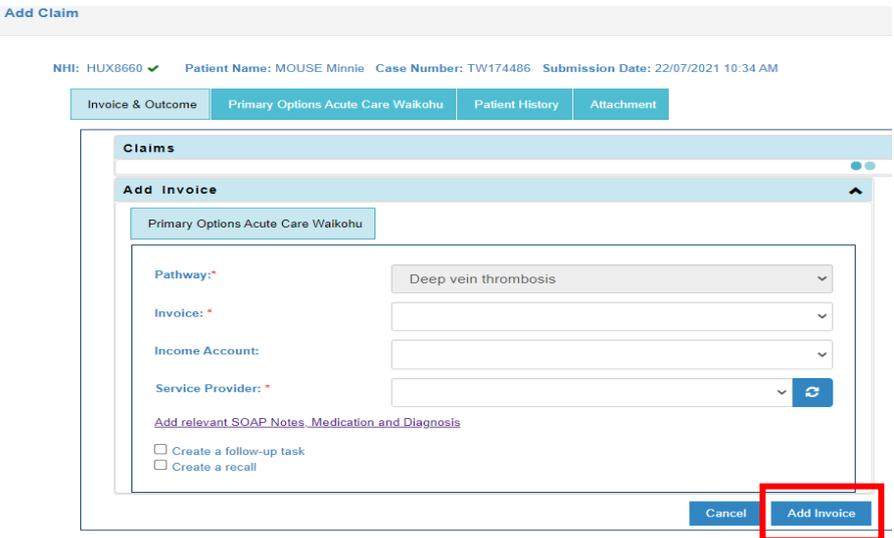
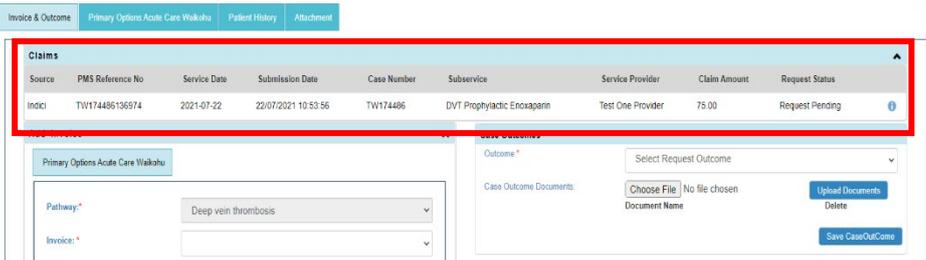
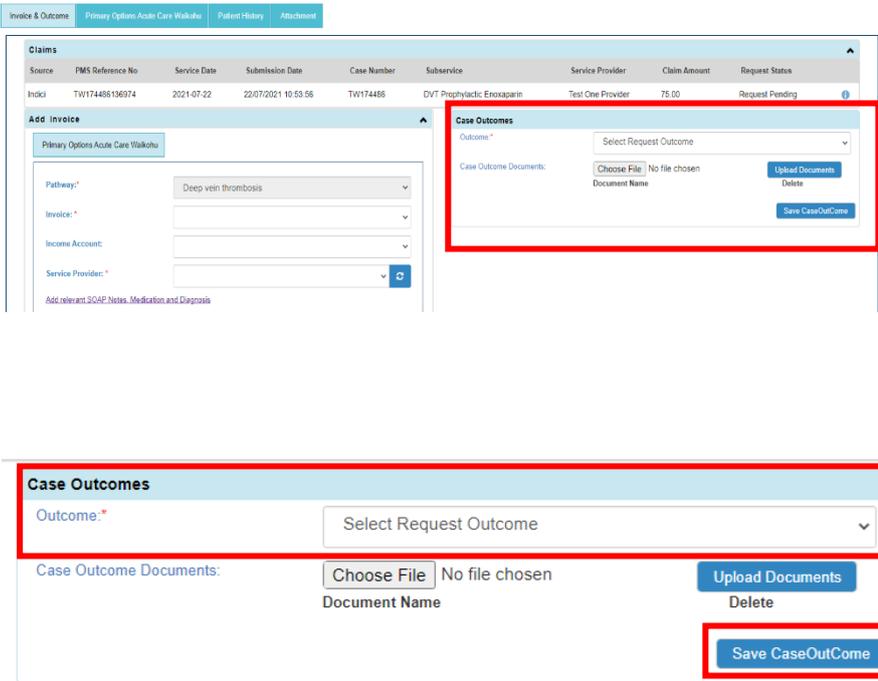


ONE POINT LESSON

INDICI How to add a claim and close/outcome a case

<p>1. Find the patient for whom you would like to lodge a claim, and open their record.</p>	
<p>2. Click on 'Referrals' on the left hand side of the screen in the PATIENT NOTE FUNCTIONS.</p> <p>This will display a list of referrals for the patient</p>	
<p>3. Click on the case # for the episode of care for which you wish to claim.</p>	

<p>4. The 'Invoice and Outcome' screen will open.</p> <p>Select the invoice type you would like to claim and make appropriate selections from the following fields drop-down menus.</p>	 <p>The screenshot shows the 'Add Claim' interface. At the top, there is a header with patient information: 'NHI: HUX8660', 'Patient Name: MOUSE Minnie', 'Case Number: TW174486', and 'Submission Date: 22/07/2021 10:34 AM'. Below this is a navigation bar with tabs: 'Invoice & Outcome' (highlighted with a red box), 'Primary Options Acute Care Waikohu', 'Patient History', and 'Attachment'. The main content area is titled 'Claims' and contains an 'Add Invoice' form. The form has a sub-header 'Primary Options Acute Care Waikohu'. The form fields are: 'Pathway:*' (dropdown menu with 'Deep vein thrombosis' selected), 'Invoice:*' (dropdown menu), 'Income Account:' (dropdown menu), and 'Service Provider:*' (dropdown menu with a refresh icon). Below these fields is a link: 'Add relevant SOAP Notes, Medication and Diagnosis'. At the bottom of the form are two checkboxes: 'Create a follow-up task' and 'Create a recall'. At the bottom right of the form are two buttons: 'Cancel' and 'Add Invoice'.</p>
<p>5. For each claim you wish to make, please add the consult notes to support the claim.</p>	 <p>This screenshot is similar to the previous one, but the 'Add relevant SOAP Notes, Medication and Diagnosis' link is highlighted with a red box. The 'Service Provider' dropdown menu is also highlighted with a red box. The 'Add Invoice' button is still visible at the bottom right.</p>
<p>6. Once you are satisfied you have selected the correct invoice and added the relevant notes, press the ADD INVOICE button at the bottom of the Add Invoice section.</p>	 <p>This screenshot is similar to the previous ones, but the 'Add Invoice' button at the bottom right of the form is highlighted with a red box. The other elements of the form remain the same.</p>

<p>7. Ensure the claim you have made moves to the top of the CLAIMS section and the Add Invoice box refreshes.</p> <p>At this point you can repeat the Add Invoice process again if you wish to make another claim on the same case number.</p>	
<p>8. Once you have completed the claims process and are confident no further claims need to be made, please close the case by submitting the outcome.</p> <p>In the Invoice and Outcome Tab, go to the CASE OUTCOME on the right hand side of the screen.</p> <p>Select the relevant outcome (eg. Completed) and press the SAVE CASE OUTCOME button</p>	
<p>9. A pop-up will appear confirming the case outcome has been submitted and the case is now closed.</p>	

*NB – if you have closed a case by accident without making a claim, or wish to make further claims, the Primary Options Co-ordinators are able to re-open the case for you. Please contact the team by phone or email to ask to reopen the case.

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