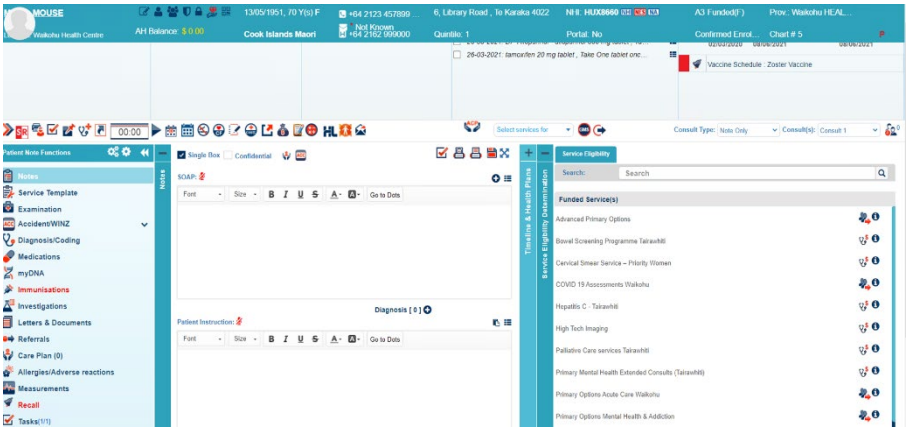
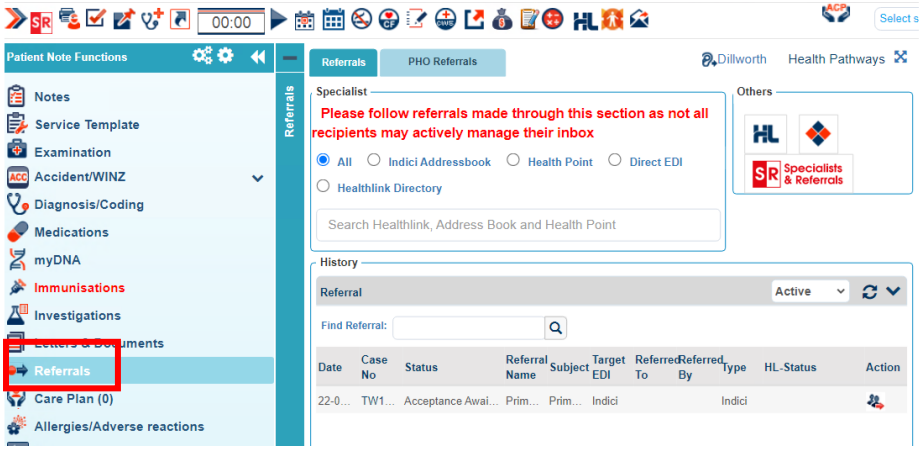
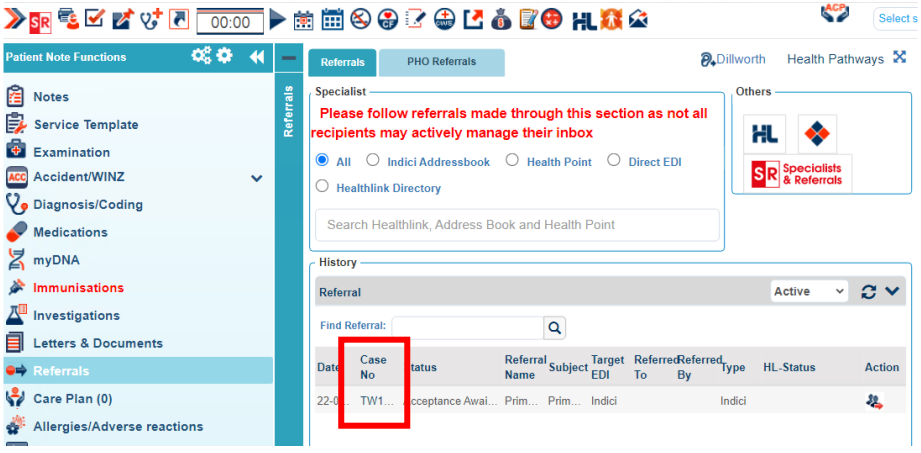
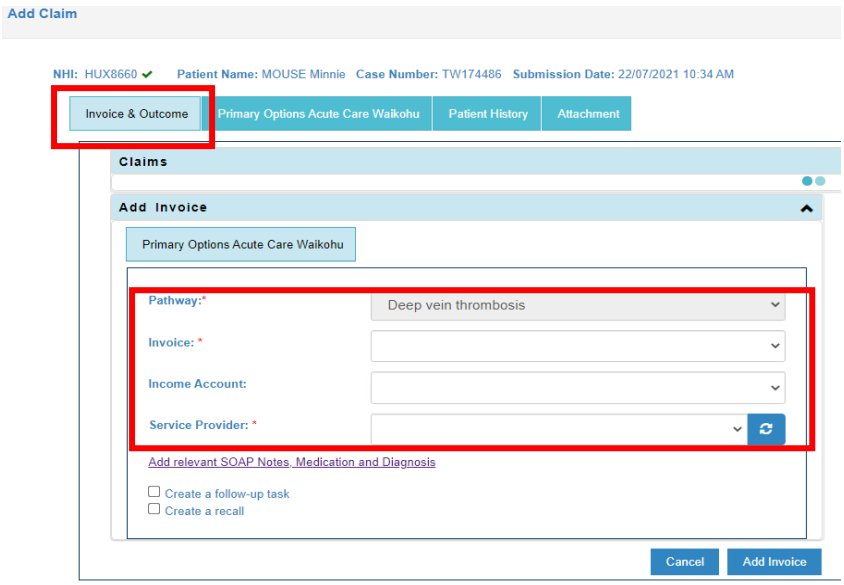
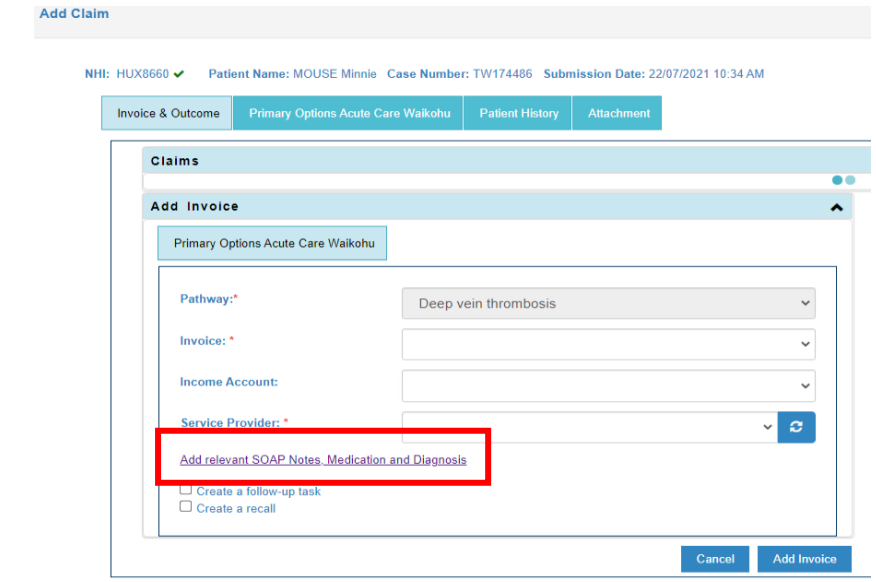
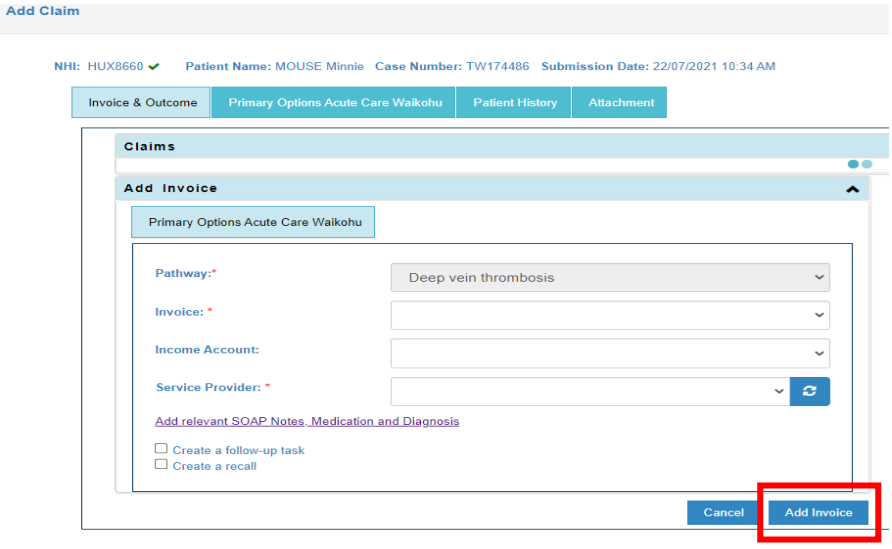
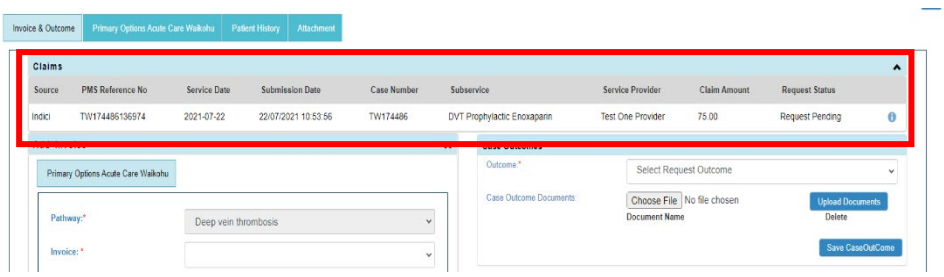
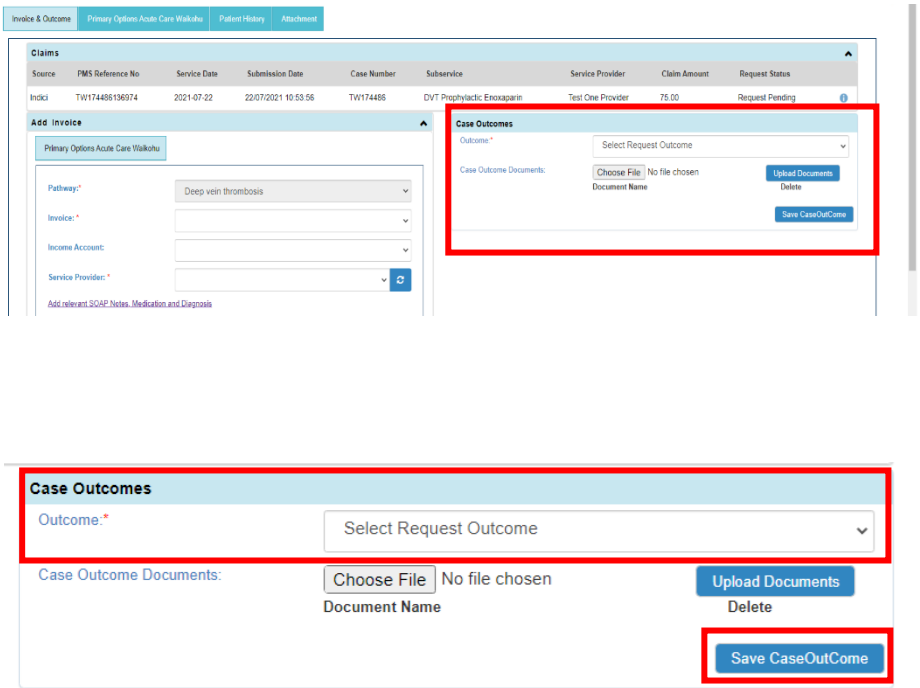
ONE POINT LESSON

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

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

4.	The 'Invoice and Outcome' screen will open. Select the invoice type you would like to claim and make appropriate selections from the following fields drop-down menus.	
5.	For each claim you wish to make, please add the consult notes to support the claim.	
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.	

7.	Ensure the claim you have made moves to the top of the CLAIMS section and the Add Invoice box refreshes. At this point you can repeat the Add Invoice process again if you wish to make another claim on the same case number.	
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. In the Invoice and Outcome Tab, go to the CASE OUTCOME on the right hand side of the screen. Select the relevant outcome (eg. Completed) and press the SAVE CASE OUTCOME button	
9.	A pop-up will appear confirming the case outcome has been submitted and the case is now closed.	 Outcome Outcome Saved Successfully. OK

*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.

Primary Options
Phone 027 687 7312
Email: infoprimaryoptions@pinnacle.health.nz