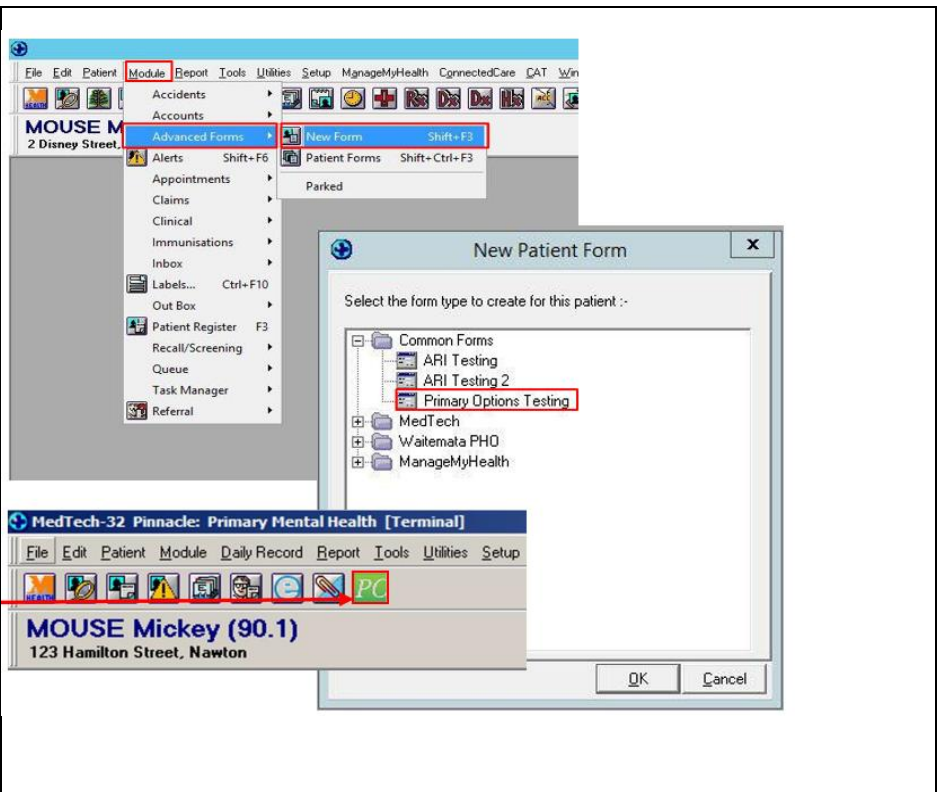
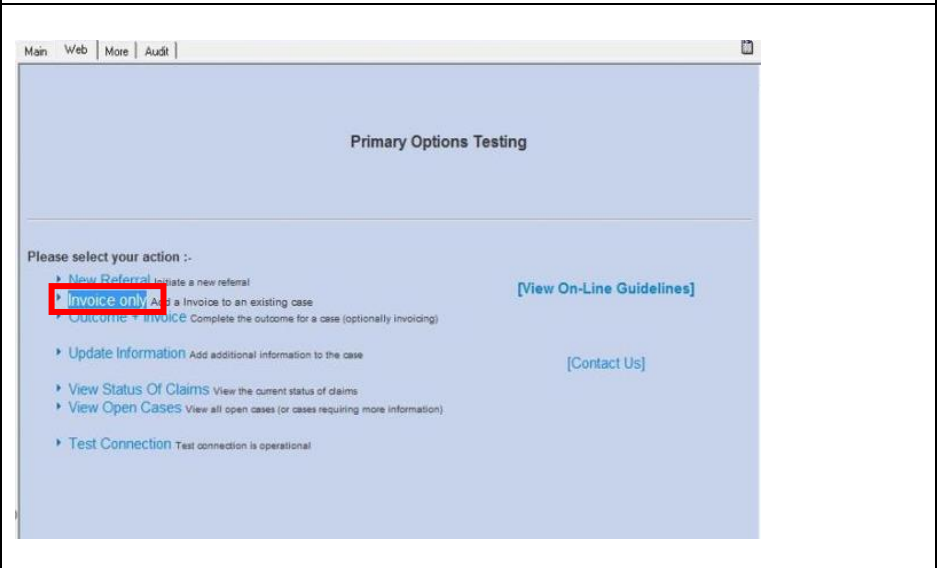


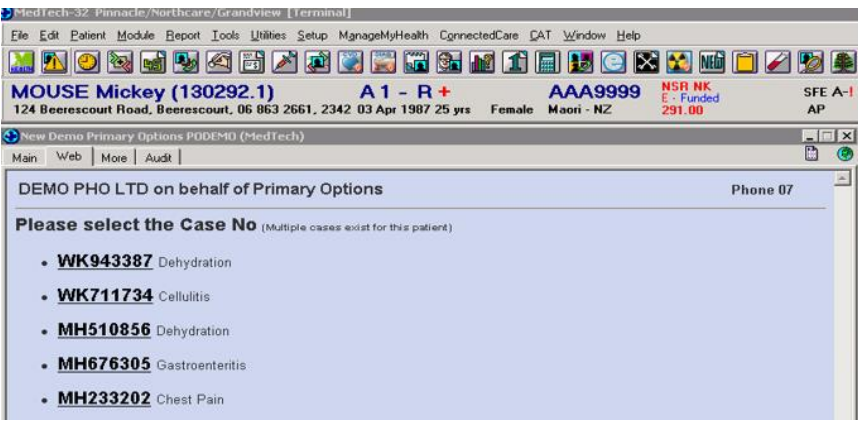
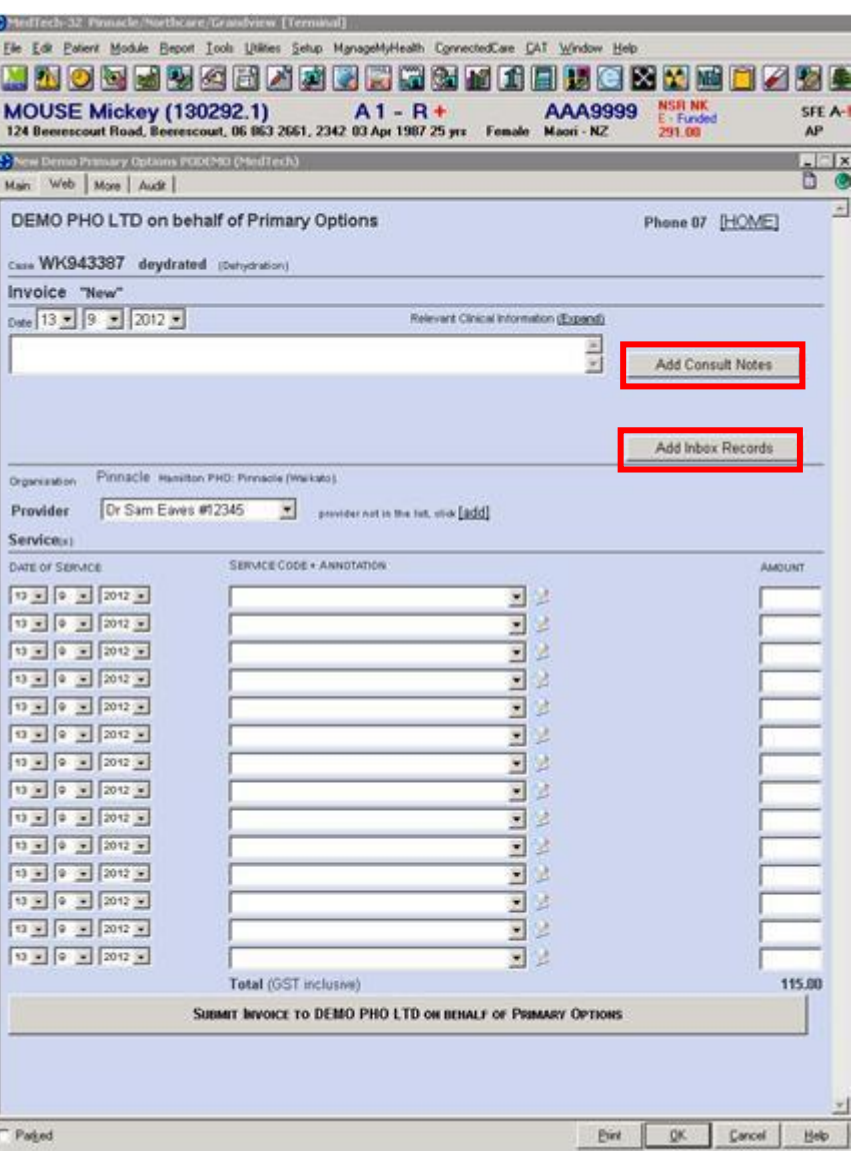
ONE POINT LESSON

How to lodge a Primary Options invoice only

PLEASE BE AWARE: Lodging an Invoice-only should only be used for cases where you wish to make a claim but not close the case at the same time. All Invoices submitted will be held for payment until an outcome is submitted.

If you are only making one claim for a case, the recommended method is submitting an outcome that includes the invoice. This closes the case ensuring payment can be made once it has been processed.

<p>1. Initiate Primary Options</p> <ul style="list-style-type: none"> - Ensure you have the correct patient on the palette. - click on Module, Advanced Form, New Form (shift F3) - Highlight MHN Primary Options - click OK <p>Alternatively: if you have the Primary Options MedTech button installed and placed on your toolbar you may click this and skip 'Step 1'</p>	
<p>2. New Invoice</p> <ul style="list-style-type: none"> - click 'invoice only' 	

<p>3. Select (double click) the Primary Options case number you want to invoice</p> <p>A list will only appear if you have more than one Primary Options case in progress</p>	
<p>4. Enter notes to support your claim</p> <ul style="list-style-type: none"> - enter the relevant date in the 'Date' section in the top left corner - attach all consultation notes in the text box provided by copying and pasting. The 'Add Consult Notes' & 'Add Inbox Records' buttons can be used to auto populate the notes – please be aware the most recent notes populate first so you may need to press the button multiple times for the appropriate notes to populate, and then delete the notes you do not wish to submit. - select the provider from the drop down menu - enter the 'Date of Service' in the bottom left corner if different to the date at the top. - select the appropriate invoices under 'Service Code'. <p>NB: If you are unsure what to claim, please check the Pinnacle website under PROGRAMMES www.pinnaclepractices.co.nz</p>	

<p>5. click 'Submit Invoice' then click 'ok' to save.</p> <p>If you click on the X in the corner of the pop-up box it will not write back to the patient notes including the accounts system.</p>	 <p>The screenshot shows a light blue header bar with the text 'Total (GST inclusive)' on the left and '115.00' on the right. Below this is a grey button with the text 'SUBMIT INVOICE TO DEMO PHO LTD OR BEHALF OF PRIMARY OPTIONS'. The button has a small 'X' icon in its top right corner.</p>
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