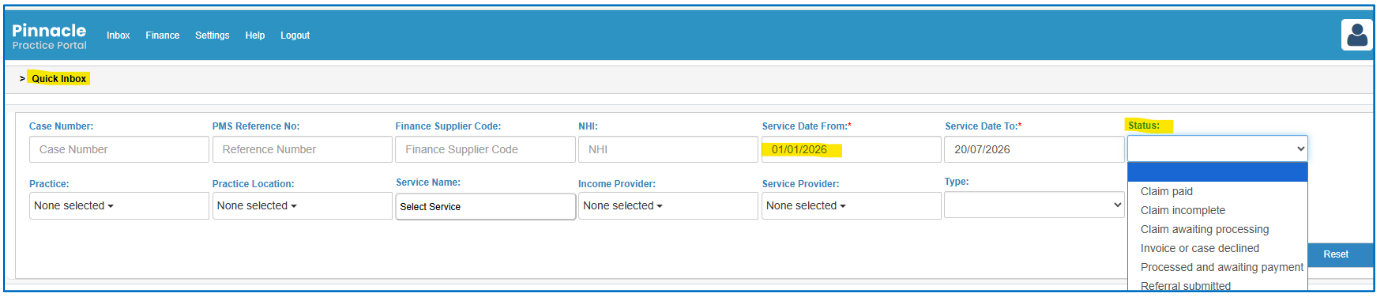
ONE POINT LESSON

Pinnacle claims portal step-by-step instructions

1. This portal is where you can find details of claims that may not have been paid. There are 2 levels of access.
Level 1: Claims listed in the quick inbox.
Level 2: Claims listed in the quick inbox – AND - Practice Documents section for all remittances/payment advices.

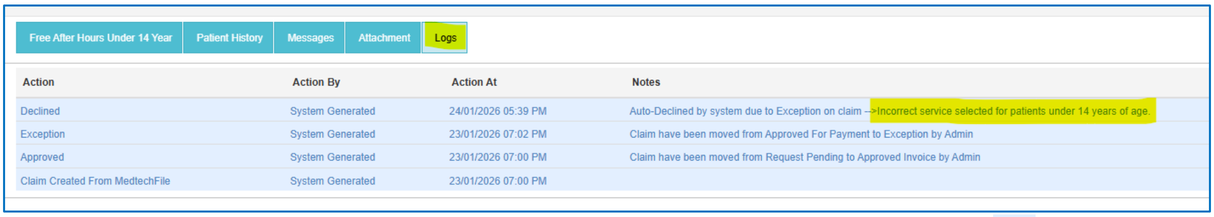
In the Quick Inbox you can view individually listed claims:

a. Change the "search date from" depending on the claim date – *default search is the current month.*
b. You can also search by "Status".



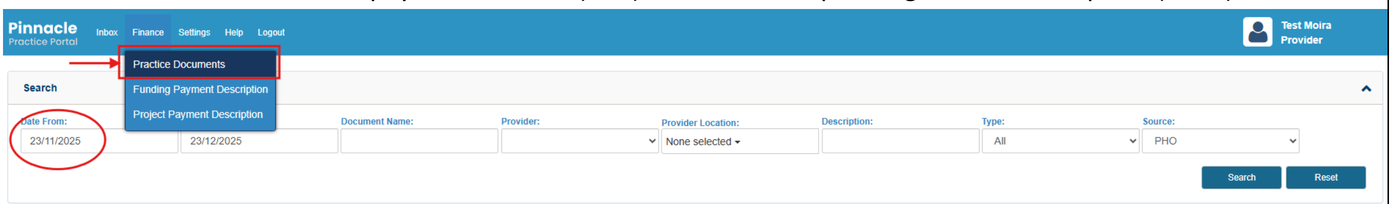
2. When you see the listed claim, you can open it by hovering over the 3 dots ●●● and clicking on "Case Detail"

In that screen, if you click on "Logs" tab, you will see the decline reason – e.g. highlighted below:



If you scroll down to the "Claim Detail" section, far right, you will see this symbol . And if you click on that, the full claim details screen will open where you may be able to update any required information.

3. If you have level 2 access, click on the "Finance" tab and you can select "Practice documents".
You should then see the list of payment advices (PDF) and the corresponding remittance reports (Excel).



The Excel Remittance Report for claims (usually uploaded first week of each month) contains full details of paid and unpaid claims. You should also receive a corresponding .PDF Tax Remittance payment advice.

6. Practice Documents – Preview and/or Download
You can download documents using the "red down-arrow" for each document.
Or you can preview documents directly in the portal (without downloading them first) using the "eye" icon for each document. A preview window will open, with the option to download from the preview if required.

When logged into the portal you can find more One Point Lesson instructions under the "Help" menu.
If you have any queries about unpaid claims or remittance reports contact: practice.support@pinnacle.health.nz