

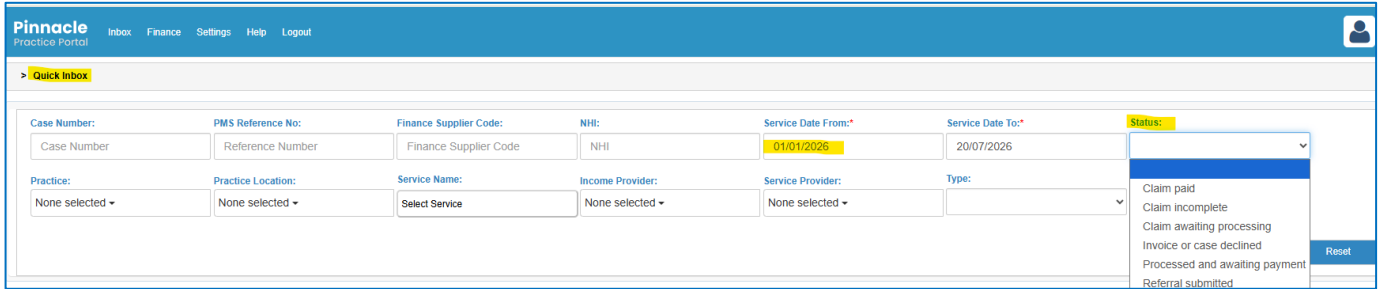
ONE POINT LESSON

Pinnacle claims portal step-by-step instructions

- 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:

- Change the “**search date from**” depending on the claim date – *default search is the current month*.
- You can also search by “Status”.



The screenshot shows the 'Quick Inbox' search interface. It includes fields for Case Number, PMS Reference No., Finance Supplier Code, NHI, Service Date From (highlighted with a yellow box), Service Date To, and Status (highlighted with a yellow box). Below these are fields for Practice, Practice Location, Service Name, Income Provider, Service Provider, and Type. A dropdown menu for Status is open, showing options: Claim paid, Claim incomplete, Claim awaiting processing, Invoice or case declined, Processed and awaiting payment, and Referral submitted. A 'Reset' button is also visible.

- When you see the listed claim, you can open it by hovering over the 3 dots **...** and clicking on “Case Detail”

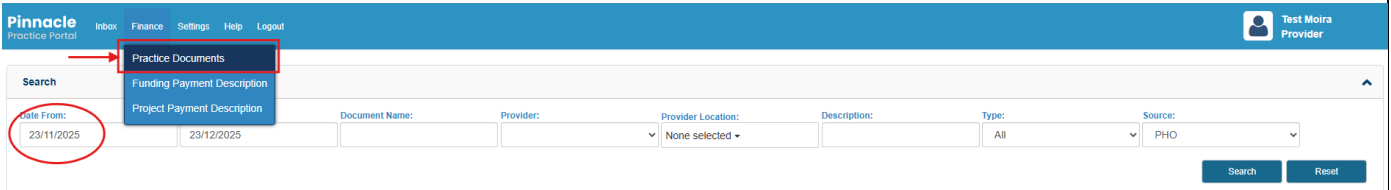


In that screen, if you click on “Logs” tab, you will see the decline reason – e.g. highlighted below:

Free After Hours Under 14 Year Patient History Messages Attachment Logs			
Action	Action By	Action At	Notes
Declined	System Generated	24/01/2026 05:39 PM	Auto-Declined by system due to Exception on claim --> Incorrect service selected for patients under 14 years of age
Exception	System Generated	23/01/2026 07:02 PM	Claim have been moved from Approved For Payment to Exception by Admin
Approved	System Generated	23/01/2026 07:00 PM	Claim have been moved from Request Pending to Approved Invoice by Admin
Claim Created From MeditechFile	System Generated	23/01/2026 07:00 PM	

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.

- 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 screenshot shows the 'Finance' tab selected in the Pinnacle Practice Portal. A red box highlights the 'Practice Documents' option in the left sidebar. Below it, the 'Search' section shows a date range from 23/11/2025 to 23/12/2025. Other search filters include Document Name, Provider, Provider Location, Description, Type, and Source. Search and Reset buttons are at the bottom right.

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.

- 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