

## How to Add a Purchase Order

- Find the client, go to claim number, and select “Add PO”

Jane Doe

**Client Status** Accepted **Address**  
**DOB** 1 Jan 2000  
**Primary Provider** Rose Garden **GP Address**  
**Referral Source** GP, Primary Care

**Notes [Admin]**

There are no notes for this client.

Add Note

**Session Notes**

You have no session notes for this client.

Add Session Note

**Claims**

Claim Number	Accident Date	Case Manager	
123456789	01 Jun 2020		edit <span style="background-color: yellow;">Add PO</span>

- Enter the PO number from the ACC purchase order, plus PO description, Contract – ie. ISSC or PSYS (start typing and the option will appear below, click into correct option)
- Enter Default start and end dates. For an Early Planning PO, use the end date for the Report code ie. SCPL
- For the SCDNA & SCCL codes, overwrite the start and end dates with the year long dates.

### Add New PO

- **Client:** Doe, Jane
- **Claim:** 123456789

**PO Number \***

900000

**PO Description**

Early Planning

**Contract \***

ISSC

**PO Start Date**

01/08/2020

**PO End Date**

01/01/2021

Save & add lines Save & go back

[Help Centre](#)

- Save and add lines.
- Enter each line of the PO, choosing the correct level for your provider/PO.
- Add the hours
- After each line, click ADD to enter another line. After final line, click SUBMIT.

#### PO Line Items

View Results

PO #900000 (388)

Show row weights

Code	Hours	Date: Start	Date: End
SCGS2	1.5	dd/mm/yyyy <small>Leave blank to use PO default</small>	dd/mm/yyyy <small>Leave blank to use PO default</small>

Add 1 more items

Submit Return to PO

- As above, enter the dates for the lines that do not fit the default – you will need to add the start date as well as the end date. You can freehand the dates or use the calendar.

#### PO Line Items

View Results

PO #900000 (388)

Show row weights

Code	Hours	Date: Start	Date: End
SCGS2	2	dd/mm/yyyy <small>Leave blank to use PO default</small>	dd/mm/yyyy <small>Leave blank to use PO default</small>
SCDNA2	4	01/08/2020 <small>Leave blank to use PO default</small>	01/08/2021 <small>Leave blank to use PO default</small>

Add 1 more items

Submit Return to PO

- Once you have entered all lines, click submit.
- To add a task (report reminder), click into the PO number, scroll down and click GENERATE TASK.

Code	Start	End	hours
<b>SCGS2</b> Getting Started Engagement Form	--	--	2
<b>SCDNA2</b> Non-Attendance Counsellor Level 7	1 Aug 2020	1 Aug 2021	4

Edit Line Items **Generate Tasks** Add task manually

- Fill in the fields using the selections available. If the task is for the Supported Assessment and you have 2 providers working with the client, choose the assessor for the reminder.

**Generating tasks for Doe, Jane under PO #900000.**

Tasks

Generate \*

- a single task  
 a set of tasks

Select the one task you would like to generate \*

Early Planning Report

*Only the selected task will be generated.*

Assignment

Select an assignee \*

- Provider  
 Administrator

*If you choose "Provider", only providers assigned to this Client will appear. If you choose "Administrator" all admins on the system will appear.*

Providers on this Client

- Rose Garden

*Any tasks generated by this form are assigned to the same person selected below.*

**Generate Selected Task Set**

Add task manually

If you would like to save a copy of the Purchase Order under the client file, please follow the instructions on ADDING A DOCUMENT

It is helpful to save the emails of PO amendment confirmations in the document section as well, providing a quick point of reference should you need to query unpaids with ACC.