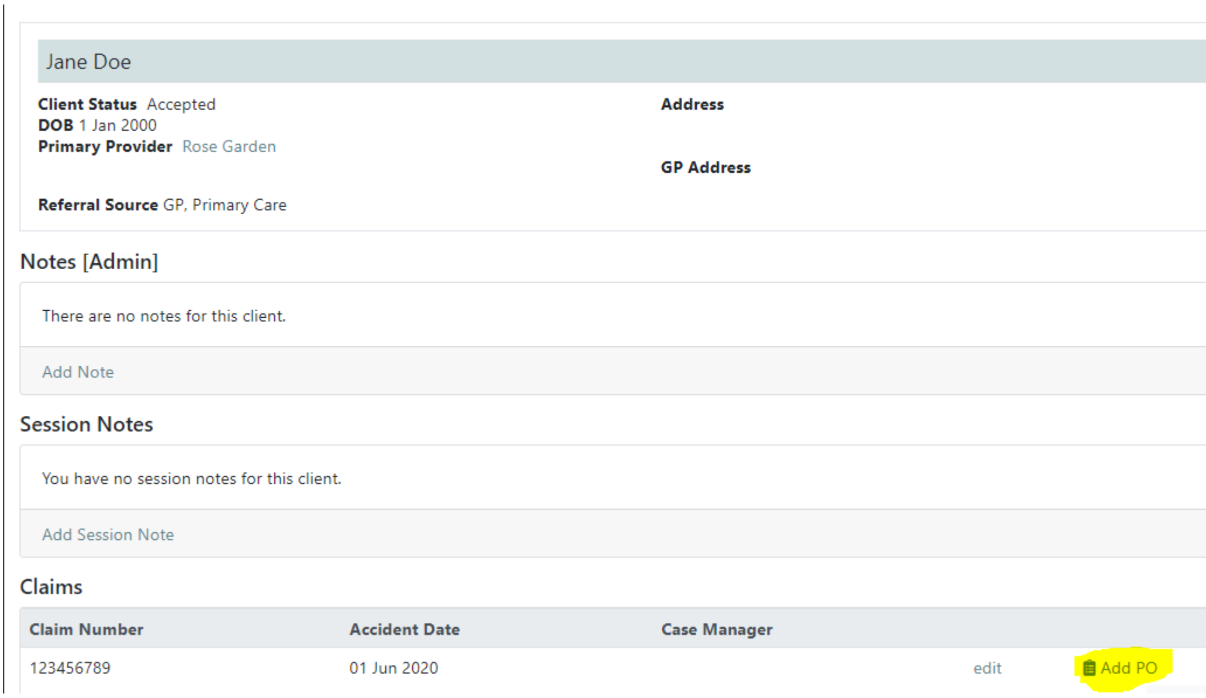
How to Add a Purchase Order

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



Jane Doe

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

Address

GP Address

Notes [Admin]

There are no notes for this client.

Add Note

Session Notes

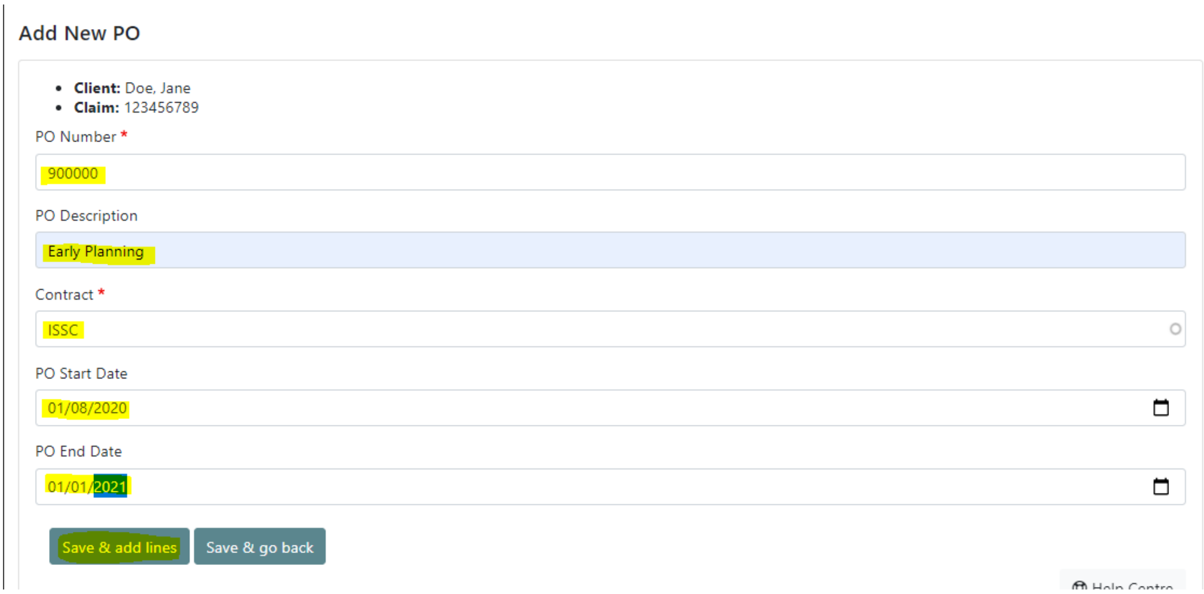
You have no session notes for this client.

Add Session Note

Claims

Claim Number	Accident Date	Case Manager		
123456789	01 Jun 2020		edit	Add PO

- 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

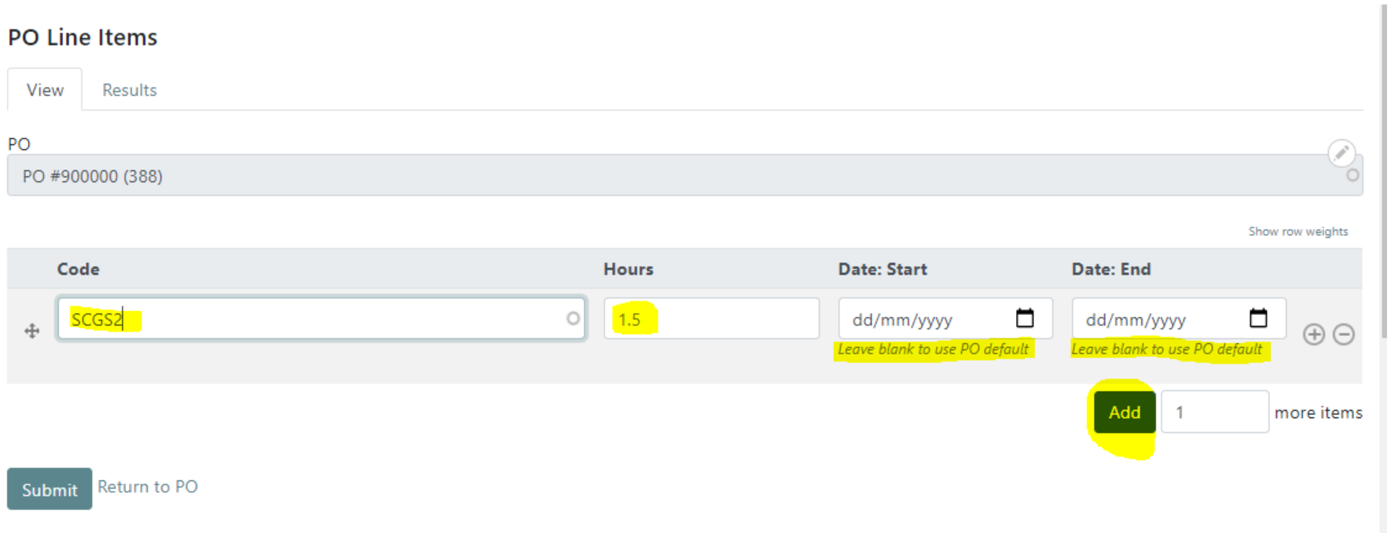
Contract *
ISSC

PO Start Date
01/08/2020

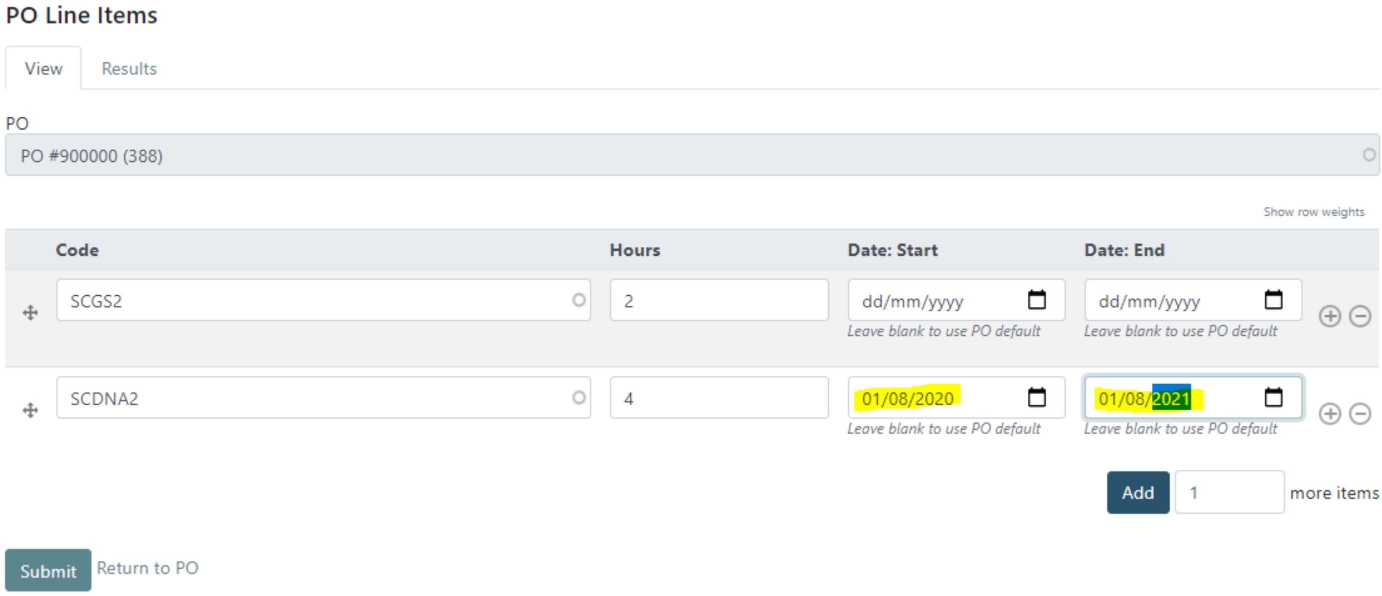
PO End Date
01/01/2021

Save & add lines | Save & go back

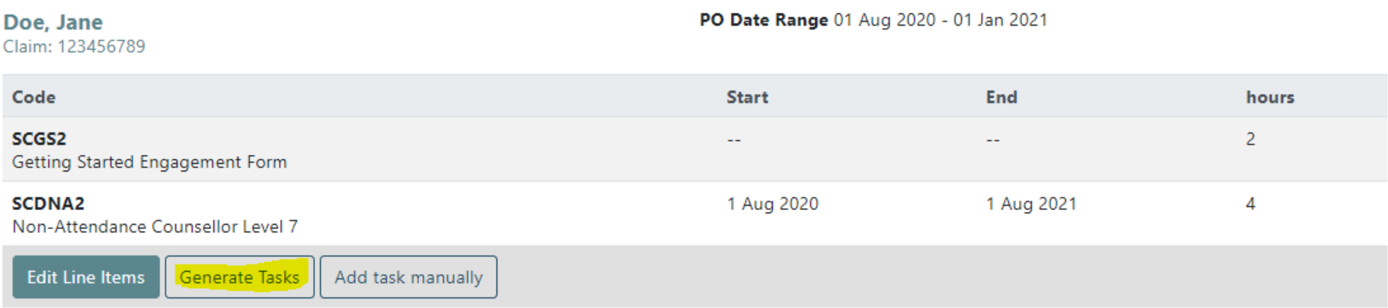
- Save and add lines.
- Enter each line of the PO, choosing the correct level for your provider/PO.
- Add the hours
- After each line, click ADD to enter another line. After final line, click SUBMIT.



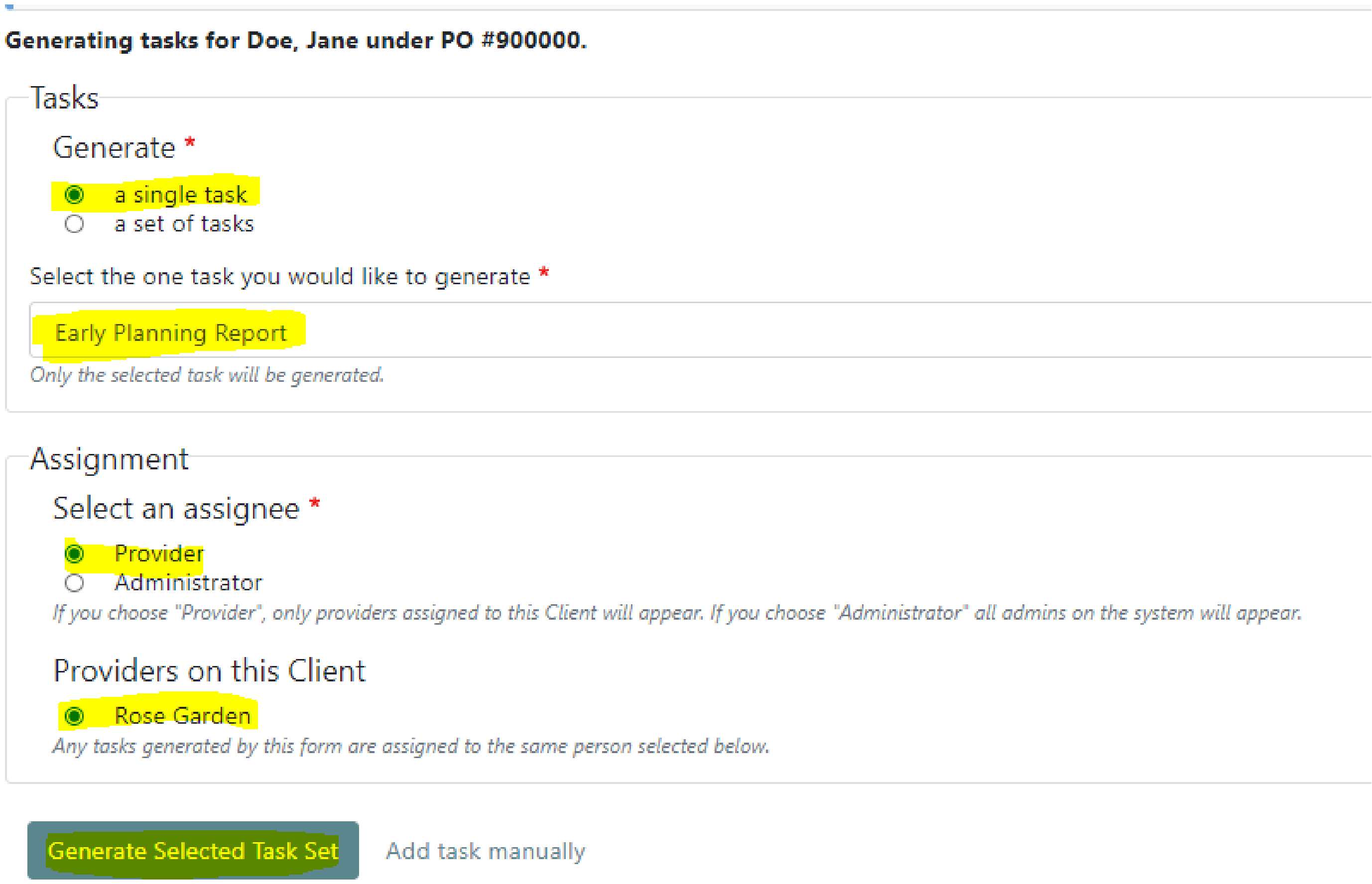
- As above, enter the dates for the lines that do not fit the default – you will need to add the start date as well as the end date. You can freehand the dates or use the calendar.



- 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.



- 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.



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.