

HAURAKI PHO CLAIMING PORTAL USER MANUAL

TE PUNA HAUORA MATUA O HAURAKI | HAURAKI PHO

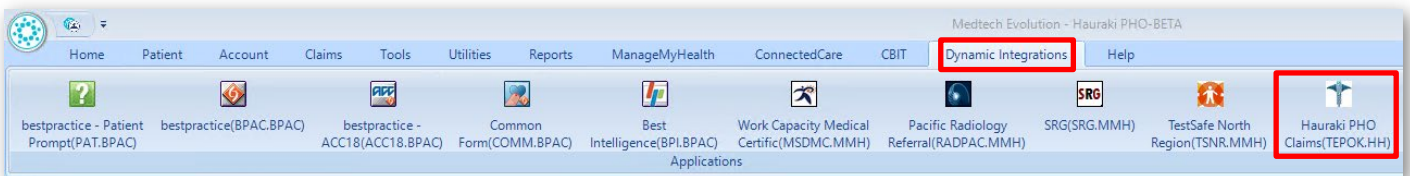
PURPOSE

Hauraki PHO's new claiming system provides a single platform for submitting claims. All Funded Services will be accessible in the one central portal. You will also be able to request a Primary Options Claim Number for Primary Options Funded imaging services.

NAVIGATION

Medtech Evolution

In your PMS, from the top menu ribbon, select the *Dynamic Integrations* tab, then the *Hauraki PHO Claims* icon or use the quick keys: **Shift + F3** to navigate to the Te Pokapū advanced form and select *Hauraki PHO Claims* in the list.



Tip: If you hover on the *Hauraki PHO Claims* icon, then right-hand click and select *Add to Quick Access Toolbar* you will be able to pin this to your Quick Access Toolbar for easy access.



Indici: Select the *Hauraki PHO Claims* icon in the main menu ribbon



PORTAL HOME



The portal will open on the **Home** page.

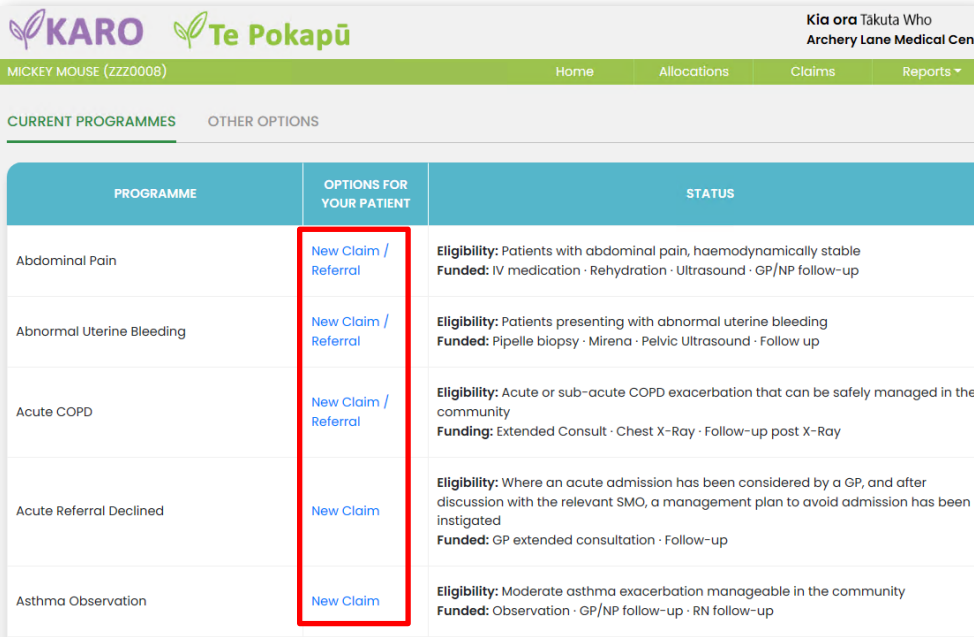
You can see all claims the patient may qualify for, along with their recent claim activity.

You are able to submit a new claim, as well as open or make changes to **Parked Claims**.

The page is divided into two sections: **"Current Programmes"** and **"Other Options."**

Selection	Function
1. Current Programmes	The “Current Programmes” tab displays the funded services the patient may be eligible for.
2. Other Options	The “Other Options” tab includes all programme options regardless of eligibility.
3. Reports	The portal includes a variety of “Reports”. These allow the practice to view claim information at a whole-of-practice level, by programme, or for individual patients. Parked form reports are also available.

SELECTING A NEW FORM

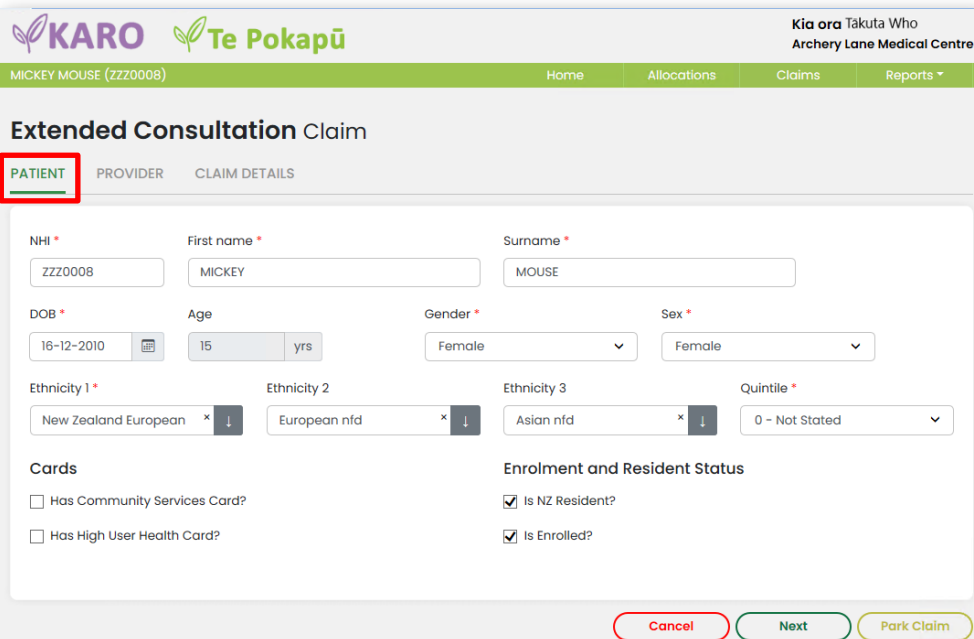


PROGRAMME	OPTIONS FOR YOUR PATIENT	STATUS
Abdominal Pain	New Claim / Referral	Eligibility: Patients with abdominal pain, haemodynamically stable Funded: IV medication · Rehydration · Ultrasound · GP/NP follow-up
Abnormal Uterine Bleeding	New Claim / Referral	Eligibility: Patients presenting with abnormal uterine bleeding Funded: Pipelle biopsy · Mirena · Pelvic Ultrasound · Follow up
Acute COPD	New Claim / Referral	Eligibility: Acute or sub-acute COPD exacerbation that can be safely managed in the community Funding: Extended Consult · Chest X-Ray · Follow-up post X-Ray
Acute Referral Declined	New Claim	Eligibility: Where an acute admission has been considered by a GP, and after discussion with the relevant SMO, a management plan to avoid admission has been instigated Funded: GP extended consultation · Follow-up
Asthma Observation	New Claim	Eligibility: Moderate asthma exacerbation manageable in the community Funded: Observation · GP/NP follow-up · RN follow-up

Whilst in the *Home* section, select the relevant *New Claim* or *Referral* form.

The *Current Programmes* section also gives brief descriptions of each programme’s eligibility criteria and funded services.

PATIENT TAB



Extended Consultation Claim

PATIENT PROVIDER CLAIM DETAILS

NHI * ZZZ0008 First name * MICKEY Surname * MOUSE

DOB * 16-12-2010 Age 15 yrs Gender * Female Sex * Female

Ethnicity 1 * New Zealand European Ethnicity 2 * European nfd Ethnicity 3 * Asian nfd Quintile * 0 - Not Stated

Cards

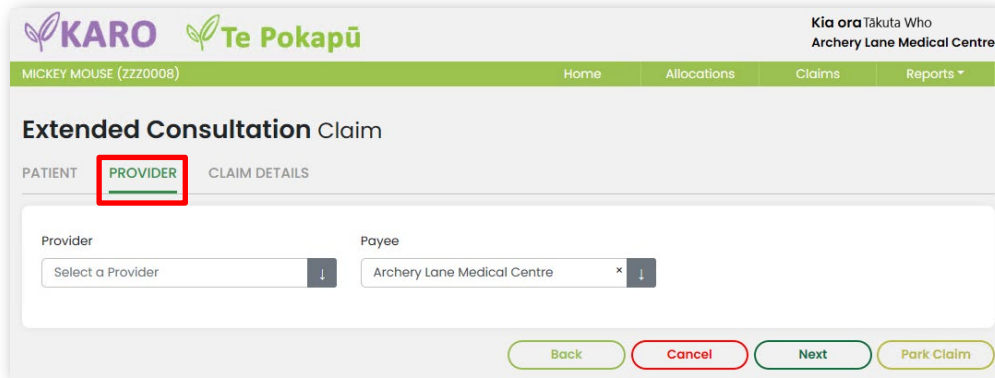
☐ Has Community Services Card? ☒ Is NZ Resident?

☐ Has High User Health Card? ☒ Is Enrolled?

[Cancel](#) [Next](#) [Park Claim](#)

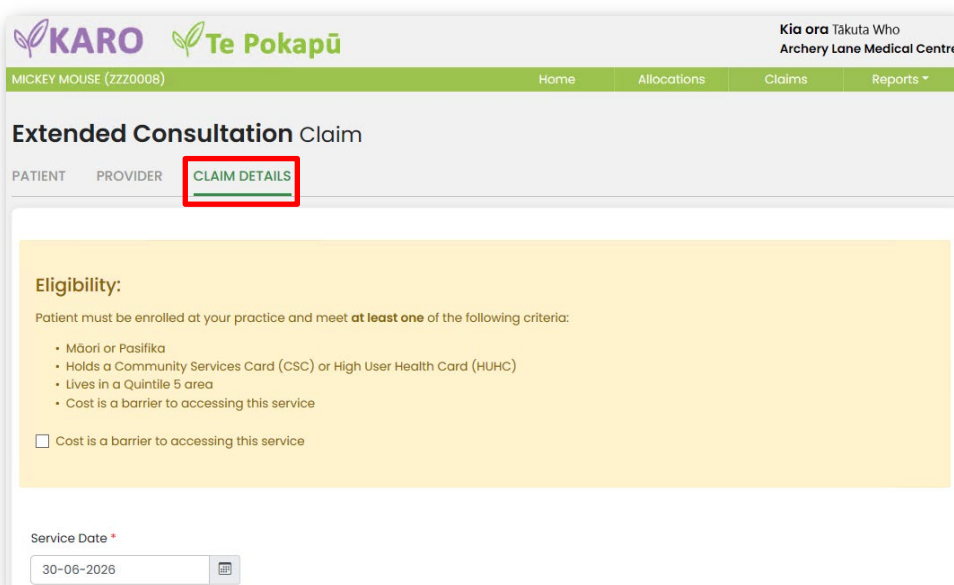
The *Patient* tab will pre-populate information directly from the PMS. If any of the required red asterisk (*) fields are blank, you will not be able to submit the claim.

PROVIDER TAB



The *Provider* tab will pre-populate with service provider details and the payee, or clinic details.

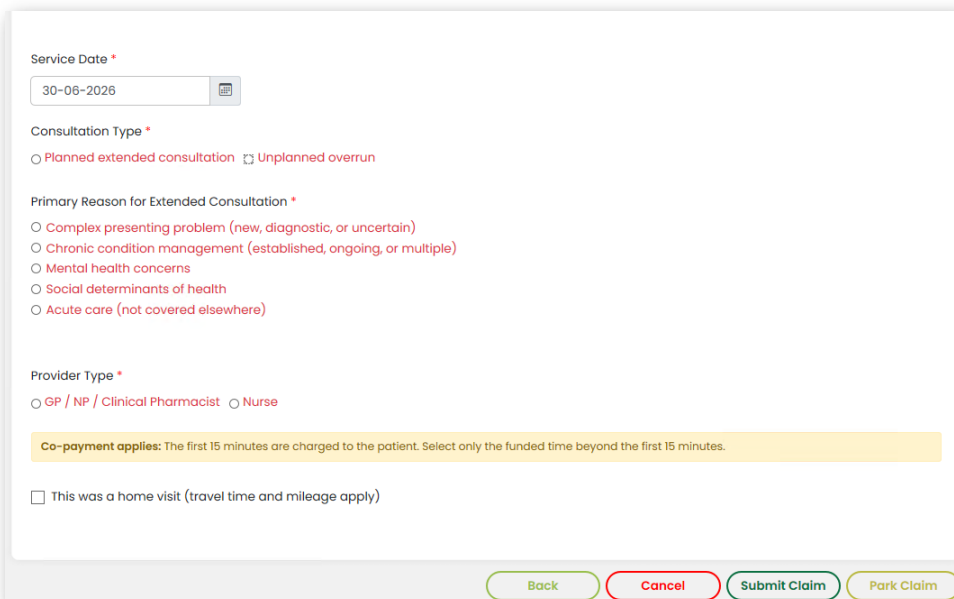
CLAIM DETAILS TAB



The *Claim Details* tab is where you will enter any relevant details prior to submission.

Some of the forms will require you to confirm:

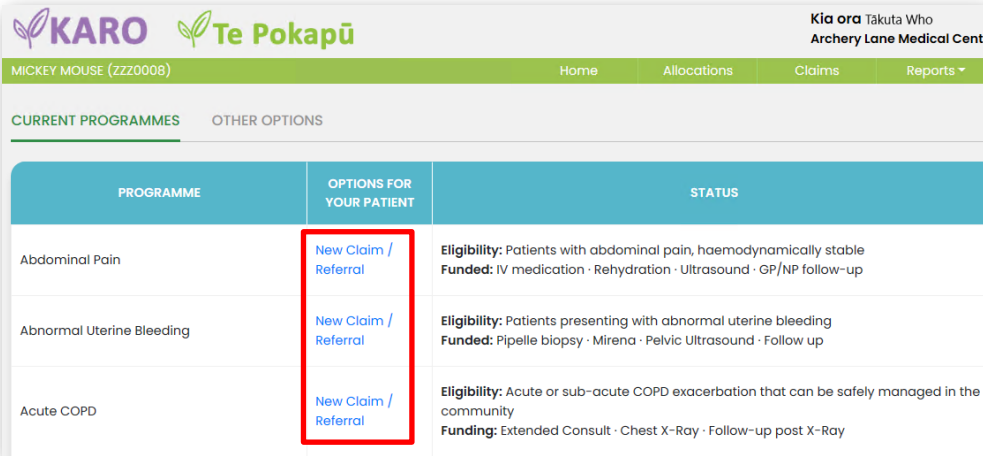
- Eligibility
- If the cost is a barrier to accessing the service
- Service date
- Service/Procedure type



If any of the required red asterisk (*) fields are blank, you will not be able to submit the claim.

If you attempt to submit the claim without completing the required fields, the section(s) that needs to be completed will be highlighted in red.

NEW REFERRAL



KARO Te Pokapū

Kia ora Tākuta Who Archery Lane Medical Centre

MICKEY MOUSE (ZZZ0008) Home Allocations Claims Reports

CURRENT PROGRAMMES OTHER OPTIONS

PROGRAMME	OPTIONS FOR YOUR PATIENT	STATUS
Abdominal Pain	New Claim / Referral	Eligibility: Patients with abdominal pain, haemodynamically stable Funded: IV medication · Rehydration · Ultrasound · GP/NP follow-up
Abnormal Uterine Bleeding	New Claim / Referral	Eligibility: Patients presenting with abnormal uterine bleeding Funded: Pipelle biopsy · Mirena · Pelvic Ultrasound · Follow up
Acute COPD	New Claim / Referral	Eligibility: Acute or sub-acute COPD exacerbation that can be safely managed in the community Funding: Extended Consult · Chest X-Ray · Follow-up post X-Ray

To generate a *Primary Options Claim Number* to include in your radiology referrals, select the relevant programme.



KARO Te Pokapū

Kia ora Tākuta Who Archery Lane Medical Centre

MICKEY MOUSE (ZZZ0008) Home Allocations Claims Reports

Abdominal Pain Claim / Referral

PATIENT PROVIDER CLAIM DETAILS

Service Date *
01-07-2026

Acute management

☐ IV medication
☐ Rehydration

Investigation / Review

☒ Ultrasound referral
☐ Follow-up

Primary Options Claim Number
HP2669260701

Select the relevant referral tick box.

Your *Primary Options Claim Number* will appear in the text box.

Click *Submit Claim* to save the form to the patient's file.

CLAIM STATUS



KARO Te Pokapū

Kia ora Tākuta Who Archery Lane Medical Centre

MICKEY MOUSE (ZZZ0008) Home Allocations Claims Reports

Claim Accepted

Claim for \$47.25 has been accepted.

Summary saved to Inbox.
An invoice for \$47.25 was lodged. Invoice no: 994.

This is an example of what an *Accepted Claim* status shows.

Deep Venous Thrombosis Claim / Referral

PATIENT PROVIDER

Service Date *
01-07-2026

Service — if applicable

Service

- ☐ Sub-cutaneous anticoagulation
- ☒ Nurse follow-up (sub-cutaneous)
- ☐ Follow up post ultrasound

Nurse follow-up is fully funded

Claim will require PHO review before it can be accepted
Claim not created. Please fix any issues and resubmit, or cancel the claim.

Nurse follow-up is only valid more than 4 days after sub-cutaneous therapy initiation — no qualifying prior claim found
Multiple DVT claims have been submitted for this patient today — please review

Your claim will require PHO review before it can be accepted. Please either fix any issues, or record a submission reason below.

Reason for Submission *

This is an example of what a *Claim that requires PHO Review* status shows.

You will need to enter your justification into the *Reason for Submission* text box.

KARO Te Pokapū Kia ora Tākuta Who Archery Lane Medical Centre

MICKY MOUSE (ZZZ0008) Home Allocations Claims Reports

B4 School Check Claim

Can't submit claim
Claim not created. Please fix any issues and resubmit, or cancel the claim.

Patient must be aged between 4 years and 5 years 7 days at the time of service

PATIENT PROVIDER CLAIM DETAILS

Service Date *
01-07-2026

This is an example of what a *Declined Claim* status shows.

CONTACT

If you have any questions or feedback about using the Hauraki PHO Claiming Portal in your practice, please contact our Practice Support Team: practicesupport@haurakipho.org.nz