

How do I add a billing notes to the patient's appointment?

08/22/2024 9:07 am EDT

Billing Notes

To add a billing note to the patient's appointment, please follow the instructions outlined below:

1. Hover over the **Billing** tab and select **Live Claims Feed**.
2. Search for a patient in the **Patient** search field by their name or chart ID or on **drc claim #** (HCFA-1500 box #26/UB04 box #3B) if you have the claim number. Please make sure you update the date range if the date of service is outside of the default 1-month period.

The screenshot shows the 'Live Claims Feed' interface. At the top, there are several filter buttons: 'Select All Offices', 'Select None', 'A nursing home All', 'B Assisted Living All', 'C new office All', and 'D Inpatient Hospital All'. Below these are more filters for 'Primary Office All', 'Telehealth All', 'Claim St All', 'Billing St: All', and 'Appt Profiles: All'. A 'Calculate Counts' button and a 'TFL Warning' checkbox are also present. The search section includes a 'Patient' field with a red arrow pointing to it, a 'Payer Name' dropdown, a 'Payer ID' field, a 'drc claim #' field with a red arrow pointing to it, a date range from '10/30/2020' to '11/30/2020', and a 'Clinical Note' dropdown. At the bottom right, there are 'Check All', 'Clear', and 'Update Filter' buttons.

3. Select the date of service of the patient to whom you would like to add billing notes.

| <input type="checkbox"/> | Info | Claim ID | Patient | Date of Service | Office |
|--------------------------|------|-----------|-----------------------|-----------------------|----------------|
| <input type="checkbox"/> | | 158499899 | Jenny (Jen) Harris | 11/02/2020 10:00AM | Primary Office |

4. On this screen, enter the information in the **Billing Notes** field. The field can be made larger by clicking on the lines in the bottom right corner and dragging. When you have entered the note, click on the blue plus + icon to save your note. The note will get added with the user name, date, and time it was added. Subsequent notes will appear on top of any previous notes, so the most recent note will always show on top.

Here is a [video](#) that will walk you through the process.

