

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

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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. Ensure 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 buttons for 'Select All Offices', 'Select None', and dropdown menus for 'C new office All', 'Primary Office All', and 'Test office All'. Below these are filters for 'Claim Type All', 'Claim St' (with status icons), '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' dropdown menu (highlighted with a red arrow), 'Payer Name', 'Payer ID', 'drc claim #' (highlighted with a red arrow), and a 'Clinical Note' dropdown. At the bottom, there are checkboxes for 'Open window in new tab' and 'Exclude future follow-up dates', along with '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"/>		324585058	Jenny (Jen) Harris	10/08/2024 09:45AM	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, press 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.