Manage Patient Claim Notes

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Notes can be used to include any special information regarding a specific patient interaction. Notes can be viewed by all users that have permission to access the Claim screen. Using the notes feature can help your team stay organized and up to date on general claim information or specific actions to come.

Add, edit or remove claim notes.

1. Select **Claim** > **Claim**.
2. Use the **Search** field to search for your claim.

> Place a check in the ***"Show exact matches only"*** box to search for exact matches or ***"Show unpaid claims only"*** to show claims that may need follow-up.

3. Open the claim.
4. Locate and click on **Patient Notes** from the right-hand side panel.

> Categorize your notes by selecting **Appointment**, **Claim**, **My**, **Patient**, **Payment**, or **Notes for this Claim**.

5. Select one of the following actions:

> Click the **Pop-out** icon to expand your notes to see more details on each note.

> When searching for **Claim Notes**, Click the **Pop-out** icon to allow filtering notes by date of service

   1. To add notes, click **Add Note** to write your message, then click **Done**.
   2. To **edit** or view existing notes, click the Note and make your changes, then click **Done**.
   3. To **sort** existing notes, click the Sort Icon and select a sorting option from the dropdown, then click **Done**.

4. To **remove** a note, select the Note and click the **Delete** icon.

    1. Undo this action by clicking the **Redo** icon

6. Click **Save** .

Copy claim notes to other claims.

1. Select **Claim** > **Claim**.

2. Use the **Search** field to search for your claim.

> Place a check in the ***"Show exact matches only"*** box to search for exact matches or ***"Show unpaid claims only"*** to show claims that may need follow-up.

3. Open the claim.

4. Locate and click on **Patient Notes** from the right-hand side panel.

> Categorize your notes by selecting **Appointment**, **Claim**, **My**, **Patient**, **Payment**, or **Notes for this Claim**.

5. Select the note you want to copy.

6. Click the **copy** icon and select the unpaid claim(s) for this patient to copy the note to (by checking the corresponding box(es).

7. Click **Select**.

8. Click **Done**.

9. Click **Save**