Write an Account Note
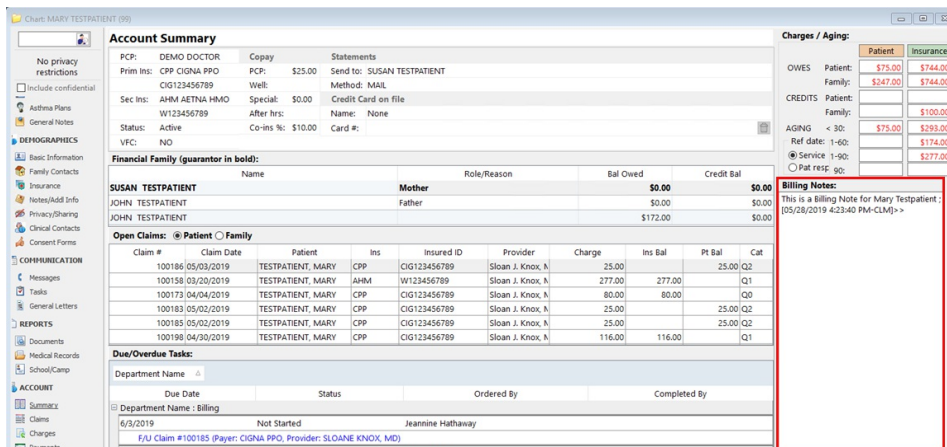
Last Modified on 11/19/2019 1:43 pm EST

Version 14.19

The Billing Notes located in the patient's chart can be used to record substantial billing issues and maintain a chronology of your receivable attempts between the office and the patient and/or an insurance payer.

1. Click the **Patient Chart** button.
2. If needed, use the Search box to locate the patient.
3. Click **Summary**. The Account Summary is displayed.
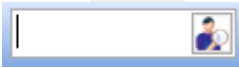4. Locate the box titled Billing Notes.

5. Double-click the **Billing Notes** field to open the Patient Register Notes and Coordination of Care. Enter the billing note for the patient.
6. Use the **Timestamp** button to add the date, time, and initials to the note.
7. Click the **Save** button to Exit.
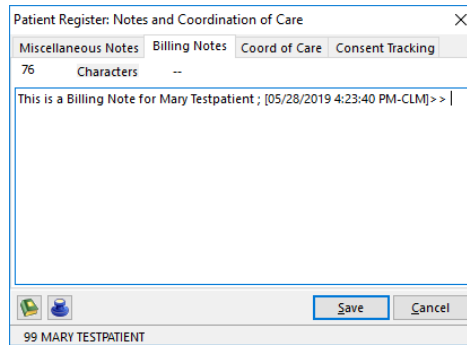
> **Note**: Add @@ to the beginning of a note to make the Billing Note box display in red. This makes it standout to any staff that may be viewing the Account Summary in the patient's chart. It will also make the note a pop-up note when an appointment is being scheduled for the patient.

Version 14.10

The Billing Notes located in the patient's account can be used to record substantial billing issues and maintain a chronology of your receivable attempts between the office and the patient and/or an insurance payer.

1. Click on the **Patient Account** button .
2. If needed, use the **Search** box to locate the patient.
3. Click the **Overview** tab of the Patient Account.
4. Locate the box titled **Billing Notes**.

5. Double-click on the box under **Billing Notes** to open the **Patient Register Notes and Coordination of Care**. Proceed with entering the billing note for that patient.

6. Click the **Save** button to Exit.

ℹ You can add @@ to the beginning of the note. By doing so, the Billing Note box will appear in red to standout to any staff that may be viewing the patient's account.