Important Content Update Message
We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

Make a Claim Note

Last Modified on 11/07/2019 1:22 pm EST

Version 14.19

Overview

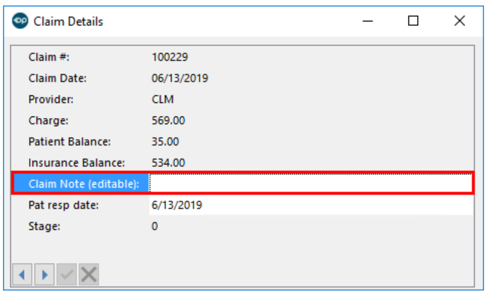
Claim notes can be made on claims in:

- The **Patient Chart**
- The **Post Bulk Payment** window
- The **Claims (A/R)** tab of the **Billing Center**

Once claim notes are made on a claim, they will show in all places where the claim can be worked on.

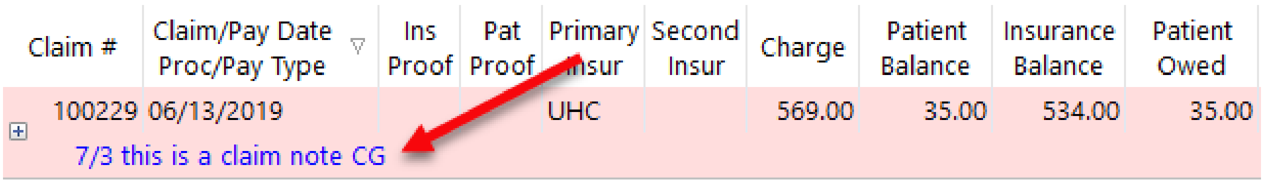
Create a Claim Note from the Patient Chart

1. Navigate to the Patient Chart: **Clinical**, **Billing**, or **Practice Management** tab > **Patient Chart** button.
2. Search for and select the patient.
3. Click **Claims** in the Window Navigation Panel.
4. Double-click on the claim number for the claim that needs a claim note.
5. The **Claim Details** window opens containing some of the claim details.



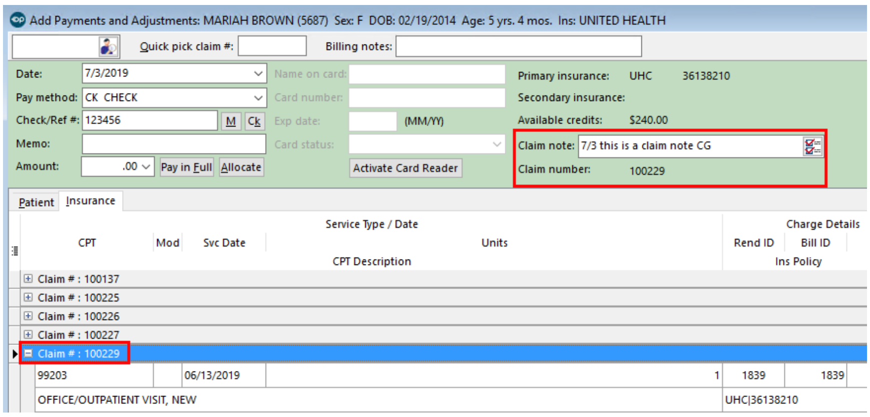
6. In the **Claim Note field**, enter your claim note. It is recommended to include the date and your initials.

7. Click the **Save** button to save your note.
8. Close the **Claim Details** window.
9. The claim note is now displayed on the claim. You can double-click on the date of service again to either edit the note or remove the claim note by deleting the text.



Create a Claim Note from Post Bulk Payments

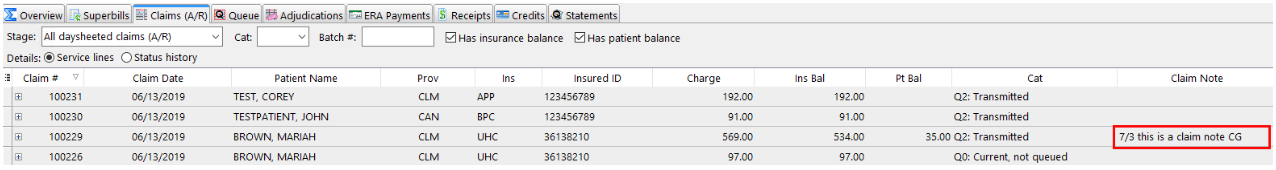
1. Navigate to Bulk Payments: **Billing** tab > **Bulk Payments**.
2. Use the **Quick Pick claim #** field to search for the claim number. The claim information displays, including the **Claim Note** field. Here you can see the same claim note that was entered for the claim or add a new claim note. If you do not use the Quick Pick claim # field to search for a specific claim, multiple claims may display for the patient. You must click the line with the claim number to see the note for that specific claim.



3. To apply a the date/timestamp to this note, click the **Timestamp** button located in the blue ribbon and right-click to paste it after the claim note.

Create a Claim Note from the Claims (A/R) Tab in the Billing Center

1. Navigate to the Billing Center: **Billing** tab > **Billing Center** button.
2. Click the **Claims (A/R)** tab.
3. Select the stage in which the claim is displayed.
4. Select the claim that needs a claim note.
5. In the **Claim Note** column, you can see current claim notes and enter a free-text claim note.



Claim #	Claim Date	Patient Name	Prov	Ins	Insured ID	Charge	Ins Bal	Pt Bal	Cat	Claim Note
100231	06/13/2019	TEST, COREY	CLM	APP	123456789	192.00	192.00		Q2: Transmitted	
100230	06/13/2019	TESTPATIENT, JOHN	CAN	BPC	123456789	91.00	91.00		Q2: Transmitted	
100229	06/13/2019	BROWN, MARIAH	CLM	UHC	36138210	569.00	534.00	35.00	Q2: Transmitted	7/3 this is a claim note CG
100226	06/13/2019	BROWN, MARIAH	CLM	UHC	36138210	97.00	97.00		Q0: Current, not queued	

6. Click out of the field to another line item to save the note.

Version 14.10

Path: Smart Toolbar > Account button

Overview

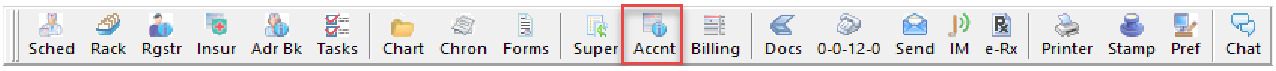
To create claim notes for billing purposes, a user can accomplish this task in:

- The **Patient Account**
- The **Post Bulk Payment** window
- The **Claims+AR** tab in the Billing Center

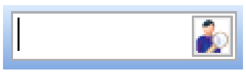
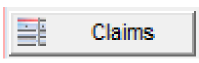
Claim notes created in the Patient Account will appear in the Claims+AR tab, and same way when claims notes are created in the Claims+AR tab, the notes will appear in the Patient Account.

Create a Claim Note from the Patient Account

1. Click the **Patient Account** button on the Smart Toolbar.



Smart Toolbar: Account

2. **Search** for the Patient the user wishes to create a claim note  .
3. Click the **Claims** tab 

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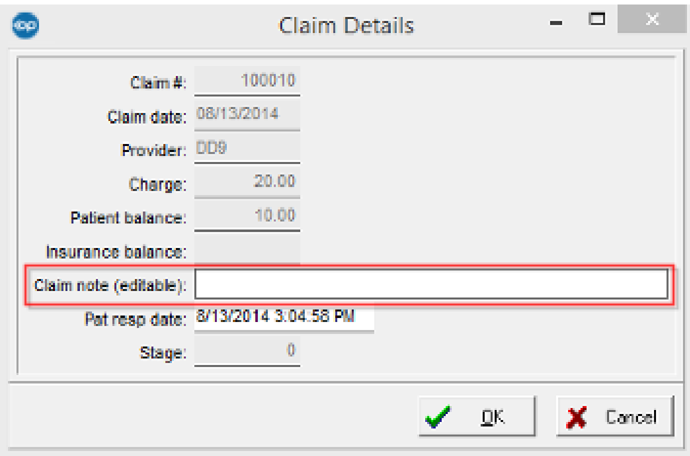
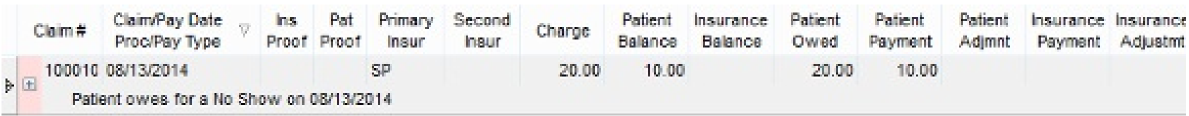
4. **Double-click** on the claim number for the Date of Service in which you desire to leave a specific note to the particular date of service in which the user is working on.
5. The **Claim Details** window will open. This will give you a free form field to put an editable note on your claim, once you add your note.

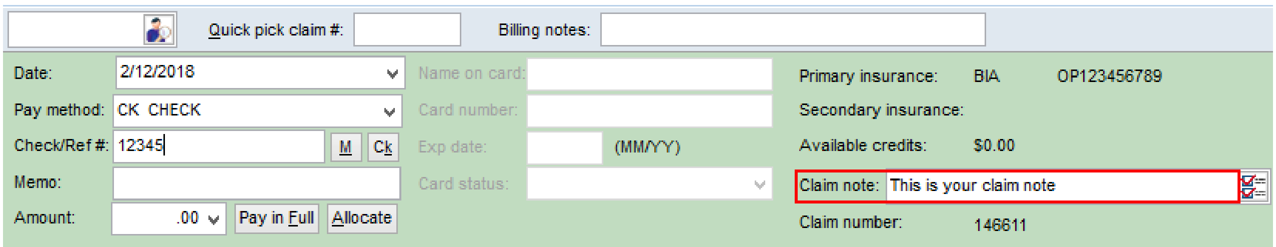


6. Click **OK** to save and close.
7. You now have a claim note on your patient's date of service. You can double-click on the date of service again to either edit the note, or completely remove the claim note.



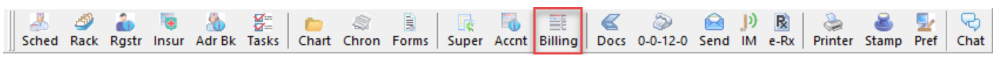
Create a Claim Note from Post Bulk Payments

1. Click **Post Bulk Payment** located under **Activities** in the main toolbar.
2. As you post your check, you cn utilize the Claim note field to make notations on the respective claim number listed below it.
3. You can apply a **Stamp** to this note using the button on the smart toolbar and clicking paste after the note.



Create a Claim Note from Claims+AR Tab in the Billing Center

1. Click the **Billing** button on the Smart Toolbar.



Smart Toolbar: Billing

2. Click on the **Claims+AR** tab 

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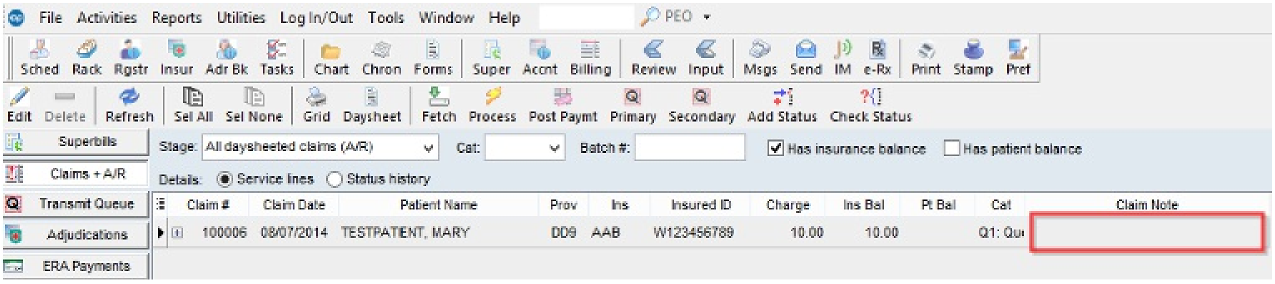
3. **Locate** a claim that you wish to leave a claim note.
4. The last column on the **Claims+AR** tab, the user will be able to input a Claim Note in the free form text field.



a. *Optional*: User may use the Blue Stamp on the smart tool bar to Time/Date stamp who wrote the note and when.

   i. Click on the **Blue Stamp** 

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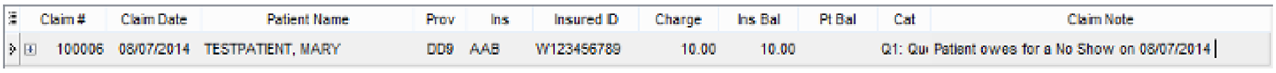
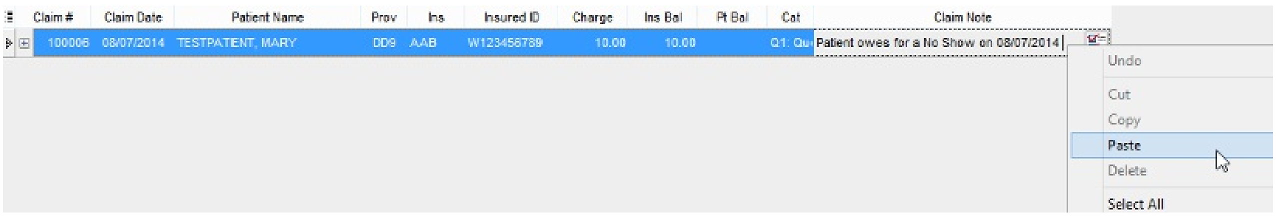
   ii. **Left Click** in Claim Note Field once.



   iii. **Right Click** and select **Paste** to Time/Date stamp who wrote the note and when.



5. Click out of the field to another line item to **Save** note.