

Exa® PACS/RIS

Feature Summary

Working with Notes

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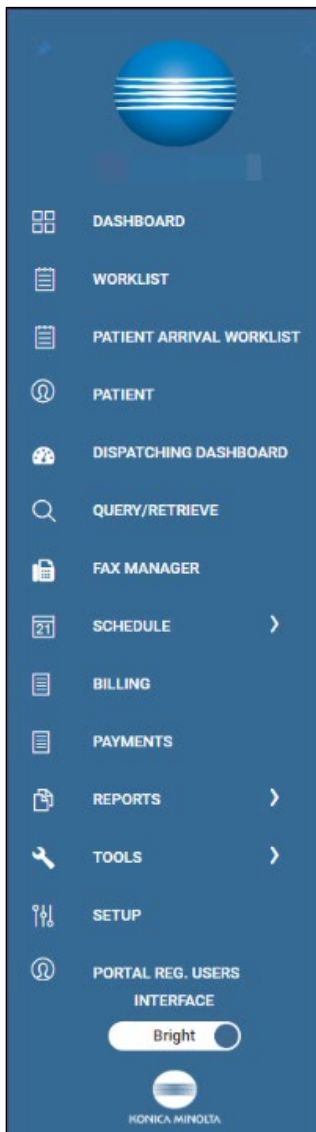
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Notes in the Claims screen

Adding notes in Exa Billing can help you keep track of important patient and study information. For example, scheduling notes and call log notes can serve as internal alerts for claims or studies. Additionally, you can add notes to individual claims by using the claims inquiry box and right-clicking.

To open the Notes area, select **Billing > Claims > Claim Inquiry**

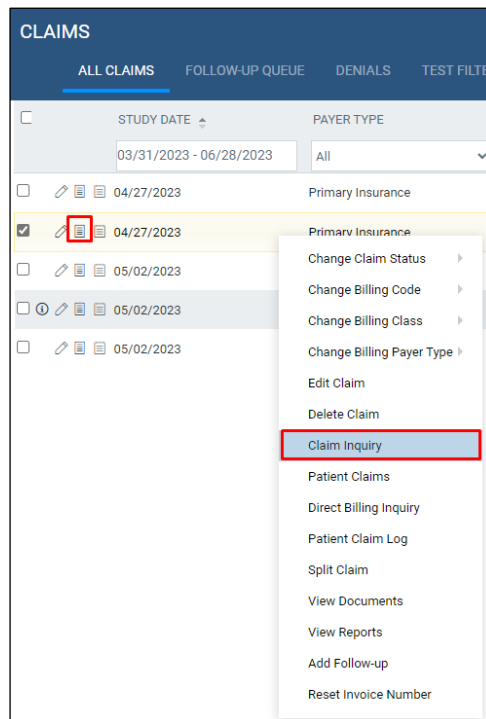
Burger > Billing...



...Claims



On the **ALL CLAIMS** screen, right-click a claim and select **Claim Inquiry**, or select the Claim Inquiry button



Add a claim note

In the Claim Inquiry screen, the notes appear at the bottom under Transaction Details.

Select **ADD**.

Transaction Detail										
PRINT ON STATEMENTS	TRANSACTION DATE	CLAIM DATE	INCLUDE ALL COMMENTS	TYPE	CHARGE	PAYMENTS	ADJUSTMENTS	DIAG PTR	PAYMENT ID	
	04/27/2023	06/07/2023		CT ABD & PELVIS W/O CONTRST 1-74178	\$0.00			1		
		<input type="checkbox"/>		Claim created on 06/07/2023 by H:						
		<input type="checkbox"/>		Paper claim (B&W) to AARP MEDIC						

In the **Add Comment** dialog, type a comment and select **SAVE**.

Add Comment ✕

TEST

Alert On Screens:

- Edit Claim
- Claim Inquiry
- Payment Reconciliation
- Patient Claims

SAVE
CANCEL

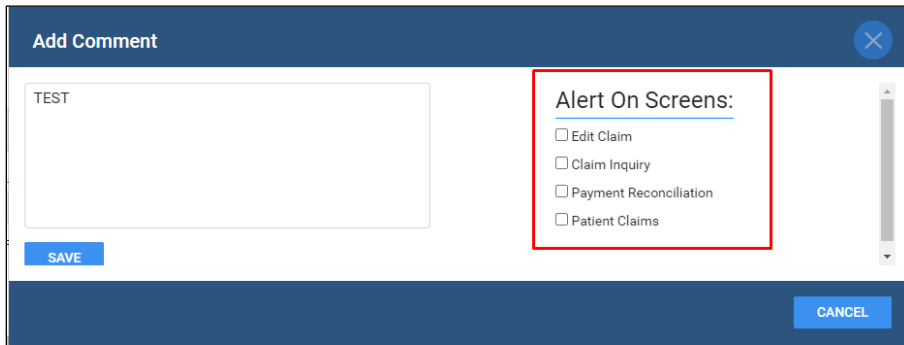
The note appears in the Transaction Details list.

Transaction Detail										
PRINT ON STATEMENTS	TRANSACTION DATE	CLAIM DATE	INCLUDE ALL COMMENTS	TYPE	CHARGE	PAYMENTS	ADJUSTMENTS	DIAG PTR	PAYMENT ID	
	04/27/2023	06/07/2023		CT ABD & PELVIS W/O CONTRST 1-74178	\$0.00			1		
		<input type="checkbox"/>		Claim created on 06/07/2023 by H:						
		<input type="checkbox"/>		Paper claim (B&W) to AARP MEDIC						
		<input type="checkbox"/>		TEST						

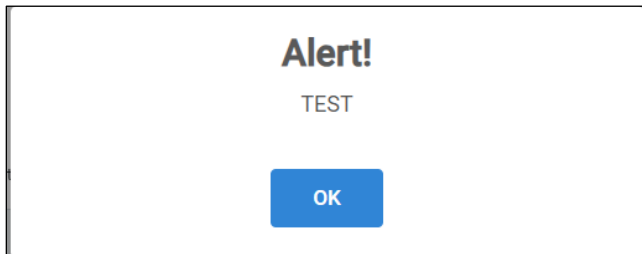
Add a note as an alert

Another option is to set the note as an alert, which you can designate to appear on the screens displayed in box 2.

- Edit Charges – The alert appears when opening the patient charges
- Claims Inquiry – The alert appears when opened the Claims Inquiry screen
- Payment Reconciliation – The alert appears when viewing claim-level payments in the Payment screen
- Patient Claims – The alert appears when viewing patient claims within the claim inquiry screen

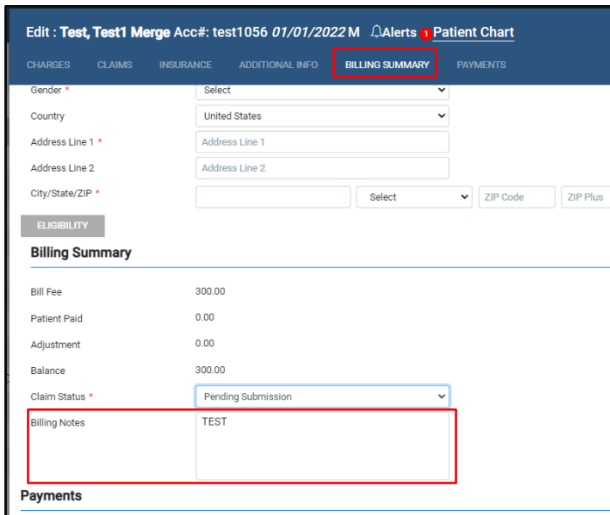


Once the note has been designated, an alert appears upon opening the assigned screen.

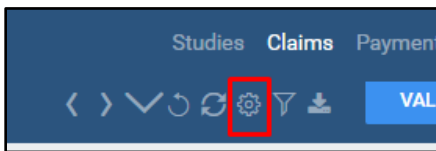


Viewing notes in the Claims screen

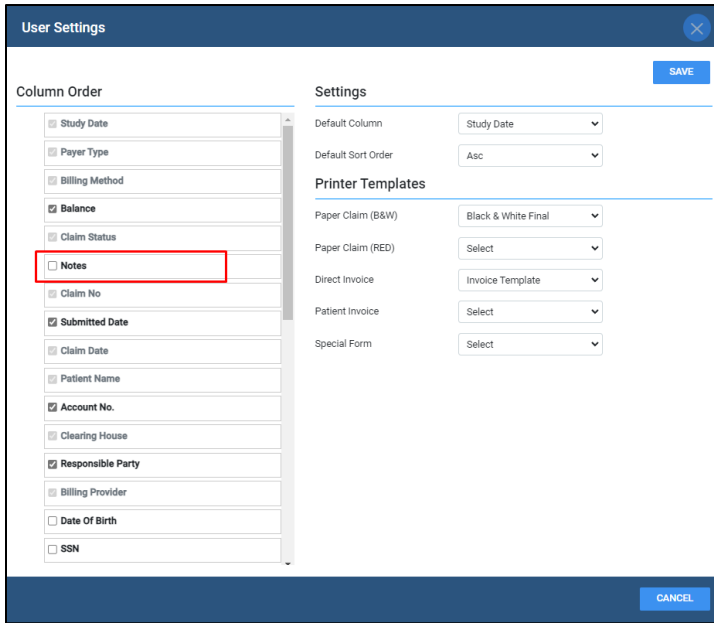
Notes added in the Billing Summary within the Charges screen can be viewed in the Claims screen.



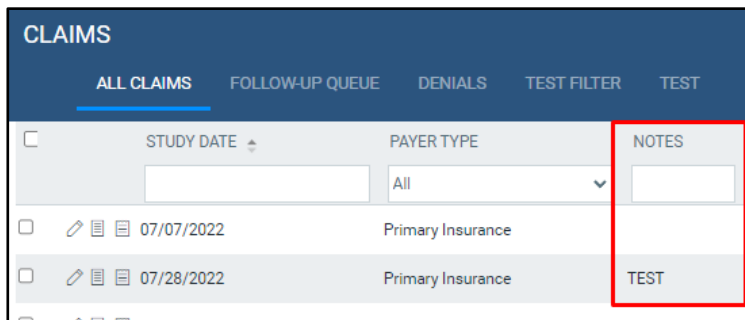
You must add the Notes column to the Claims screen. On the Claims screen, select the settings button.



In the **User Settings** screen, under **Column Order**, select the **Notes** column. You can also drag columns to reorder them. Select **SAVE**.

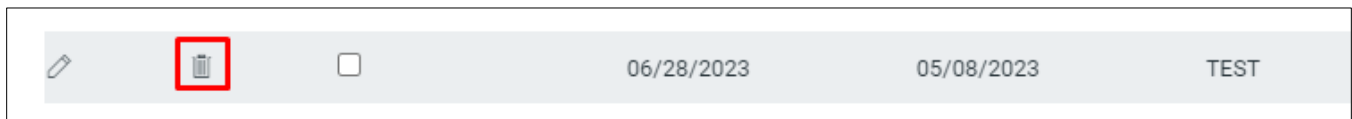


The Notes column appears, and your note appears on the claim line.



Delete a note

To delete a note, in the Claim Inquiry screen, select the trash can bin on the note line in the claims Transaction Details area.



To delete a note in the Billing Summary, open the claims box highlight and delete the note then hit save.