Exa® PACS/RIS

Feature Summary

Working with Notes

Contents

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.

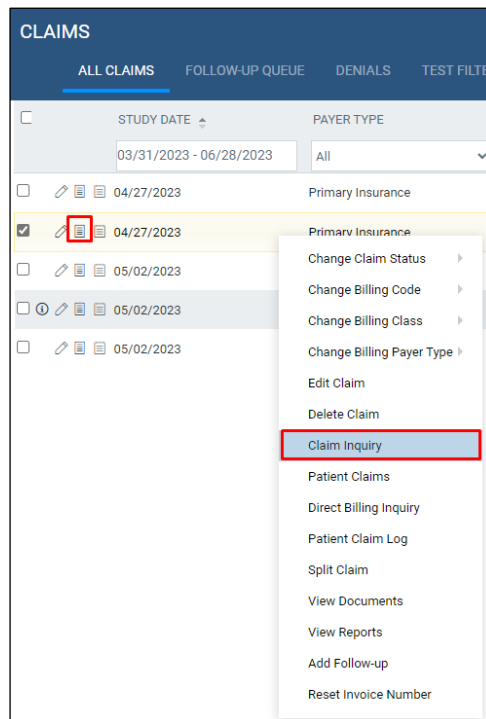To open the Notes area, select **Billing** > **Claims** > **Claim Inquiry**
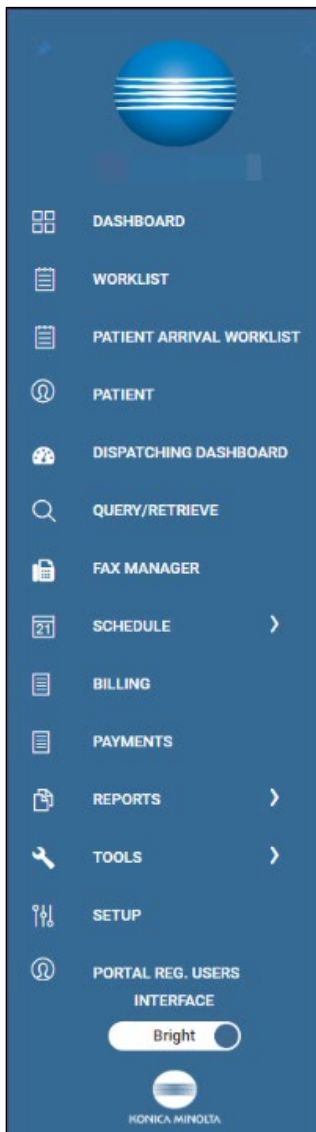
Burger > **Billing**...   ...**Claims**

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**.

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

The note appears in the Transaction Details list.

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
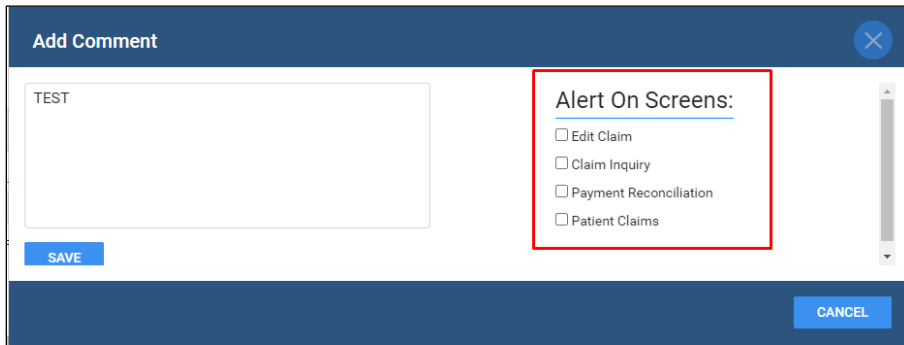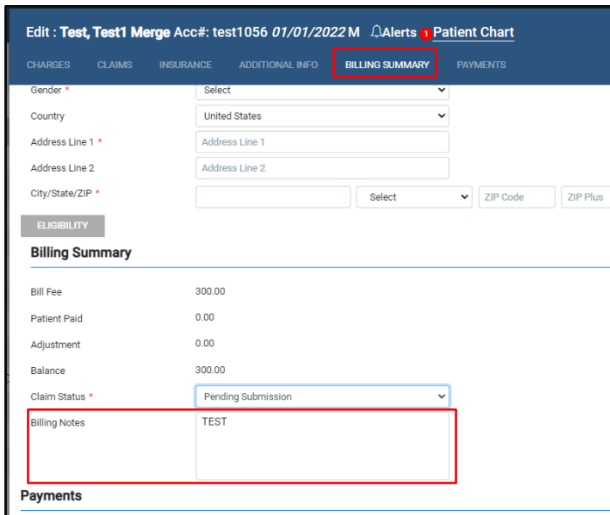

Once the note has been designated, an alert appears upon opening the assigned screen.
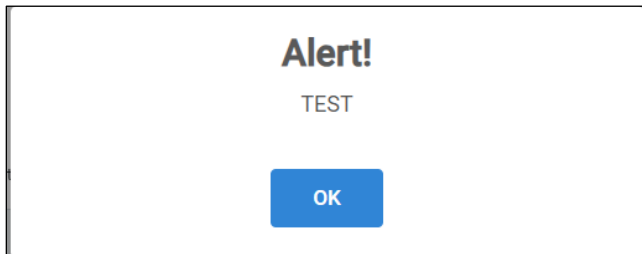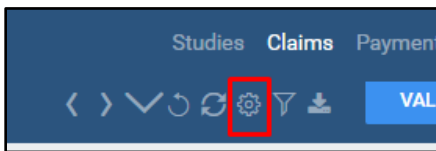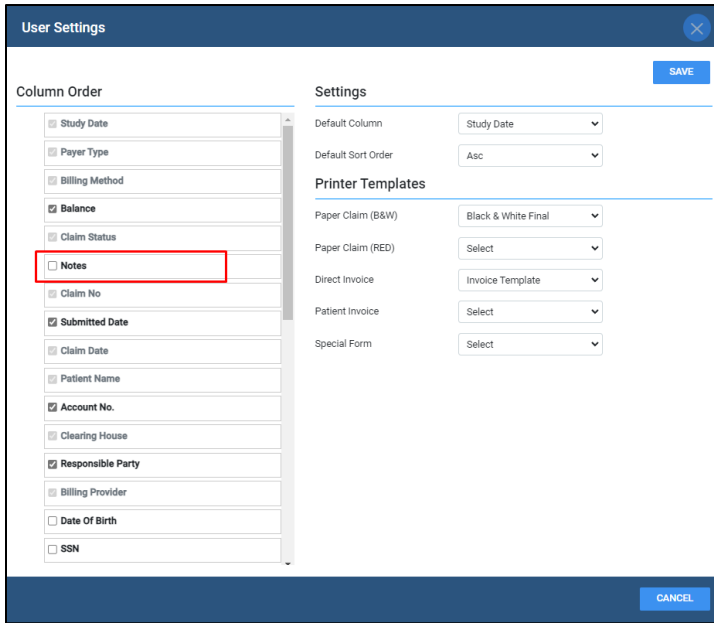
Viewing notes in the Claims screen

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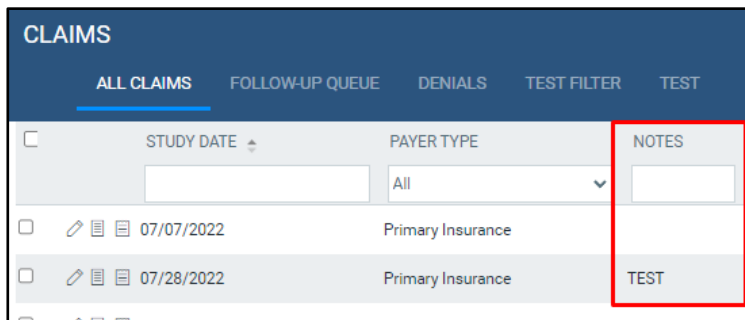

You must add the Notes column to the Claims screen. On the Claims screen, select the settings button.

In the **User Settings** screen, under **Column Order**, select the **Notes** column. You can also drag columns to reorder them. Select **SAVE**.
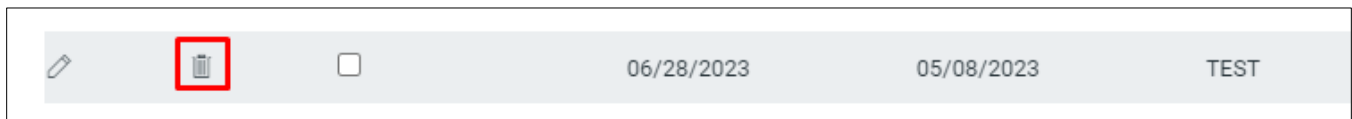
The Notes column appears, and your note appears on the claim line.

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.