

Creating a Claim Comment

Last Modified on 02/19/2025 12:35 pm EST

1. Open the **Claim Details** as seen here. This can be accessed from Claim Query or linked from related deposits:

The screenshot shows the 'Claim #30694 for Wes Test 12/04/1970 (50y)' window. It is divided into three main sections: Status, Patient, and Service. The Status section includes fields for Claim (30694), Status (Closed - Electronic Superbill), Substatus, Level (Primary), Billing (Electronic), Type (Other), and Owner (Norris, Drew). The Patient section shows Patient (312024 - Wes Test), Pat. Location, Pat. Provider (Adkins MD, Stanley), Resp. Party (Test, Wes), Primary (1) Aetna, and Secondary insurance. The Service section includes Location (Adkins Medical Group), Rendering (Adkins MD, Stanley), and Referring (Referring Provider).

2. Begin by clicking the **Comments** button under the Messages and Monitoring portion of the Claim Details:

Messages and Monitoring

Aging	N/A
Billing Message	✓
Claim Validation	✗
Patient Validation	✓
Patient Only	N/A
Code Limitations	✗
Required Fields	N/A
Global Period	N/A
837 Validation	✗
Monitoring	✗

Alerts (2) **Comments** Activity Log

You can also utilize the Claim Comment

from the toolbar:

The screenshot shows the 'Billing' toolbar with a 'Claim' button highlighted by a red box. A dropdown menu is open from the 'Claim' button, showing options: History, Copy, Modify, **Comments** (highlighted by a red box), Re-render, Send Communication, and Custom Task. Below the toolbar is a table with columns: #, Claim ID, Claim DOS, and a description column.

#	Claim ID	Claim DOS	
1	66394	02/07/2	

3. Click "+" to **Add Comment** or the pencil icon to **Edit Comments**:

Claim Comments

Claim: 66394

T3st, Danielle Born: Jan 1, 19

Existing Comments

Type
System
User
User

+

4. Add Comment: Use Default Comments, Biller Action, Followup Date, Assigned To, Biller Action Completed, and Include Claim Comment in Statement options as needed. Then Save.

Claim Comments

Claim: 700210
John, Test Born: Jul 17, 1991 (33y) Gender: Male

Existing Comments

New Comment

New Comment

Default Comments

Biller Action [dropdown] [edit]

Followup Date [calendar]

Assigned To [dropdown]

Biller Action Completed

Include claim comment in statement

Key items when creating a Claim Comment for Billing needs:

Default Comments may be utilized to store specific phrasing used often. These can be added to a particular Claim or Patient Comment and edited to save from having to type it out each time.

Biller Action is used to document any follow-up needed by billing. This will be used for reporting as well as tracking and is especially helpful when working on aged receivables.

Followup Date Set the date that a biller should follow up if this claim is not resolved. This is an alert of the date the action needs to be taken.

Assigned To is used to identify who the follow-up is assigned to.

Biller Action Completed is used to record that a biller action (Adjustment Taken, Appeal Submitted, etc.) was taken for future reporting on Biller Productivity.

Include Claim Comment in Statement Allows the comment to be printed in the Patient Statement as a detailed line underneath the specific claim it's associated with.
