

# Patient Statements with Optum

Last modified on 04/16/2025 11:58 am EDT

On DrChrono's Apollo or Apollo Plus plan, you can send and manage your patient statements through the **Patient Statements** page.

1. To access your patient statements, hover over **Billing** on your DrChrono navigation bar and press **Patient Statements**.
2. Once you press **Patient Statements**, you'll be taken to the Patient Statements page.

The screenshot shows the 'Patient Statements' page. At the top, there are tabs for 'Patient Statements', 'Active Patients', and 'All Patients'. Below the tabs are search filters: 'Patient' (dropdown), 'Patient Group' (dropdown), 'All' (button), 'Patient Flags' (text input), 'Include' (dropdown), 'Selected Flags' (text input), and 'Statement ID' (text input). There are also checkboxes for 'Since last statement was printed' (All), 'Include pt with zero bal', and 'or bal between' (from, and, to). A 'Calculate All' button and a 'Search' button are present. Below the filters, there are checkboxes for 'Statement due date' (Due Date), 'Include note in statement', and 'Include a summary with balance for each provider'. A green 'Actions' button is on the right. A note states: 'Print PDF will show only claims with a patient balance but no insurance balance. Print Transaction will show all appointments whether the claim has a balance or not.' A yellow banner says: 'Please note: printing, mailing or previewing any statement will also make that statement available to patients in onpatient. To disable this, uncheck "Send statements to onpatient" in Account Settings -> General.' Below the banner, it says '0 Patients Selected' and '1 - 6 OF 6'. A table lists patient data with columns: Patient, Chart ID, Last Appt, Upcoming Appt, Last Stmt, Last Payment Amt, Last Payment Posted, # of Mailed Stmts, # since Last Payment, and Str.

Patient	Chart ID	Last Appt	Upcoming Appt	Last Stmt	Last Payment Amt	Last Payment Posted	# of Mailed Stmts	# since Last Payment	Str
<input type="checkbox"/>	ALSA000001	08/31/2016		Sep 13, 2016 -0 days ago by Thomas Your			0	0	\$3,1
<input type="checkbox"/>	BRCH000001	09/06/2016		Sep 13, 2016 -0 days ago by Thomas Your			0	0	\$1
<input type="checkbox"/>	CAAS000001	08/31/2016		Sep 13, 2016 -0 days ago by Thomas Your			0	0	\$4,3
<input type="checkbox"/>	DJPE000001	09/06/2016		Sep 13, 2016 -0 days ago by Thomas Your			0	0	\$4,1
<input type="checkbox"/>	SABR000001	08/26/2016		Aug 31, 2016 -12 days ago by Thomas Your	\$250.00	08/24/2016	0	0	\$
<input type="checkbox"/>	YEJA000001	09/08/2016	09/14/2016	Aug 31, 2016 -12 days ago by Thomas Your	\$20.00	08/18/2016	0	0	\$1

3. To begin, select what type of patients you will be using: Active Patients or All Patients.

The screenshot shows the 'Patient Statements' page tabs: 'Patient Statements', 'Active Patients', and 'All Patients'. The 'All Patients' tab is selected, indicated by a green question mark icon.

4. Specify what result you are looking for with the following search/filter options.

The screenshot shows the search filters on the 'Patient Statements' page. It includes dropdowns for 'Patient' and 'Patient Group', a button for 'All', a text input for 'Patient Flags', a dropdown for 'Include', a text input for 'Selected Flags', and a text input for 'Statement ID'. There are also checkboxes for 'Since last statement was printed' (All), 'Include pt with zero bal', and 'or bal between' (from, and, to). A 'Calculate All' button and a 'Search' button are present.

- **Patient:** The patient's name. Fill out this field if you are looking for a specific patient.
- **Patient Group:** Search for patients that fall within a certain patient group (Patients > Patient Groups)
- **Patient Flags:** Search for patients that have a certain patient flag (Patients > Patient Flags)
- **Include/Exclude:** For the flag field, you can choose to include/exclude to include/exclude results with certain patient flags.
- **Statement ID:** If you know the statement ID of the statement you are searching for, you may enter that here.
- **Last Statement Printed:** The last time a statement was issued to the customer. Your options for search are as follows:
  - 30+ Days

- 60+ Days
  - 90+ Days
  - 6+ Months
  - 1+ Year
- **Include Patient with Zero Balance:** Include patients who have paid off their balance.
  - **Balance Range:** Search for a certain balance range.

Below the search options, you have the statement modifiers and actions.

Statement due date	<input type="text" value="Due Date"/>	<input type="button" value="✖"/>	Include note in statement	<input type="button" value="✎"/>	<input type="checkbox"/> Include a summary with balance for each provider
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- **Statement Due Date:** Insert a due date for your patient on the statement.
- **Include Note in Statement:** Insert a note on the statement.
- **Include a Summary with Balance for Each Provider:** Add a balance breakdown for each provider.

If you need to **update the phone number** listed to call if the patient has billing questions, please reach out to [support](#) and we'll be happy to assist.

- To view your changes or to preview the statement before printing them, select **Preview** to the right of your patient in the results.

[Preview](#)

Once you select **Preview**, you'll be presented with your patient statement in the form of a PDF.

**Employee Test**  
230 Nostrand Ave  
Unit 2  
Brooklyn, NY 11205

Statement ID: 1-14-158		
Statement Date	Pay This Amount	Chart ID
04/16/2024	\$600.00	GRRO000001
SHOW AMOUNT PAID HERE:	\$	

000001  
GREEN, ROOT  
1 MAIN ST  
NEW YORK NY 10044-0052

**MAKE CHECKS PAYABLE / REMIT TO:**

Employee Test  
1 Main St  
Unit 1  
Mountain View CA 49040

For questions about billing, call . To pay by credit card, call .  
You can also pay by credit card online at [onpatient.com](http://onpatient.com) - If you don't have access, call to request an account.

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Please detach and return top portion with your payment.

**STATEMENT**

Patient: Root Green	Chart ID: GRRO000001	Statement ID: 1-14-158
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Date of Service	Provider	Procedure	Charge	Adjustment	Insurance Paid	Patient Paid	Balance Due
4/03/2024 12:00AM	Employee Test	CUSTOM5 - Custom 5	\$600.00				\$600.00
Total:			\$600.00				\$600.00

Total Amount: \$600.00

For questions about billing, call . To pay by credit card, call .  
You can also pay by credit card online at [onpatient.com](http://onpatient.com) - If you don't have access, call to request an account.  
**Accepted Credit Card(s):** Visa, Mastercard, Discover, American Express

Employee Test, 230 Nostrand Ave Unit 2, Brooklyn, NY 11205

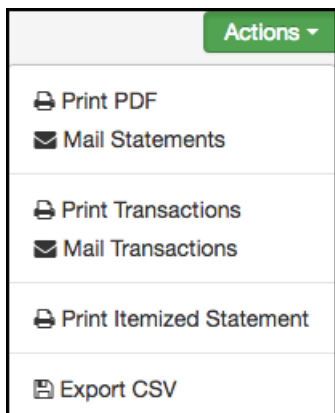
The difference with the new statement with Optum is that there is a number on the left side, just above the patient's name and address. This number is an internal Optum ID number and is not useful in any way regarding your practice, your patient, or the amount due.

000001  
GREEN, ROOT  
1 MAIN ST  
NEW YORK NY 10044-0052

If you would like to print your statements or have DrChrono send your statements to Optum for printing and

mailing for you, first select the patients you would like to send statements to, then select Print PDF or Mail Statements in the Actions menu.

- If you select **Mail Statement**, Optum will mail your statements for you at the cost of **\$0.90** per statement.
- Likewise, you can **print/mail transactions** and produce an itemized statement or a CSV file for each patient that can then be handed to or mailed to a patient.



Patient statements can also be automatically sent to your patient's OnPatient account. If you would like to enable that feature, follow the guide found [here](#).

For Apollo Plus plans, please speak to your Billing and/or Account Manager to discuss workflow for patient statements under your plan.

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