

# Patient Statements with Optum

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## Patient Statements through Optum

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 select **Patient Statements**.
2. Once you select **Patient Statements**, you'll be taken to the Patient Statements page.

The screenshot shows the 'Patient Statements' page with the following elements:

- Navigation tabs: Patient Statements, Active Patients, All Patients (with a question mark icon).
- Search filters: Patient (dropdown), Patient Group (dropdown), All (radio button), Patient Flags (text input), Selected Flags (dropdown), Statement ID (text input), Calculate All (button), Search (button).
- Advanced filters: Since last statement was printed (dropdown), Include pt with zero bal or bal between (checkbox), from (text input), and (text input), to (text input).
- Statement settings: Statement due date (Due Date, dropdown), Include note in statement (checkbox), Include a summary with balance for each provider (checkbox), Actions (dropdown).
- Notes: 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.
- Warning: Please note: printing, mailing or previewing any statement will also make that statement available to patients in outpatient. To disable this, uncheck "Send statements to outpatient" in Account Settings -> General.
- Summary: 0 Patients Selected, 1 - 6 OF 6.
- Table with columns: Patient, Chart ID, Last Appt, Upcoming Appt, Last Stmt, Last Payment Amt, Last Payment Posted, # of Mailed Stmts, # since Last Payment, 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 close-up shows the navigation tabs: Patient Statements, Active Patients, All Patients (with a question mark icon).

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

The screenshot shows the search and filter options: Patient (dropdown), Patient Group (dropdown), All (radio button), Patient Flags (text input), Include (dropdown), Selected Flags (dropdown), Statement ID (text input), Calculate All (button), Search (button).

- **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="x"/>	Include note in statement	<input type="button" value="pencil"/>	<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
<b>SHOW AMOUNT PAID HERE:</b>	\$	

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 - If you don't have access, call to request an account.

.....  
 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	CUSTOMS - Custom 5	\$600.00				\$600.00
<b>Total:</b>			<b>\$600.00</b>				<b>\$600.00</b>

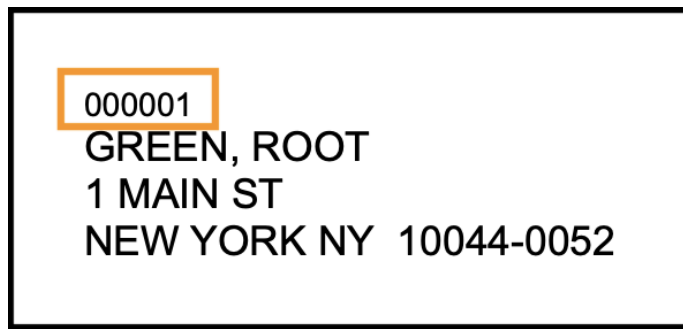
Total Amount: **\$600.00**

For questions about billing, call . To pay by credit card, call .  
 You can also pay by credit card online at onpatient.com - 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**

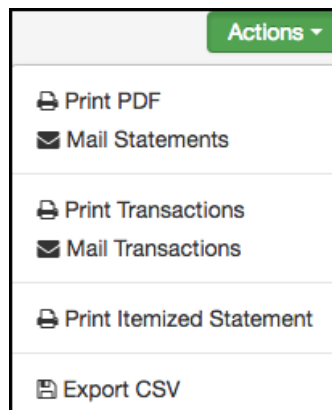


The difference with the new statement with Optum is that there is a number on the left side, just above the patient's name and address. This number is an internal Optum ID number and is not useful in any way regarding your practice, your patient, or the amount due.



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 **\$0.78** 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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