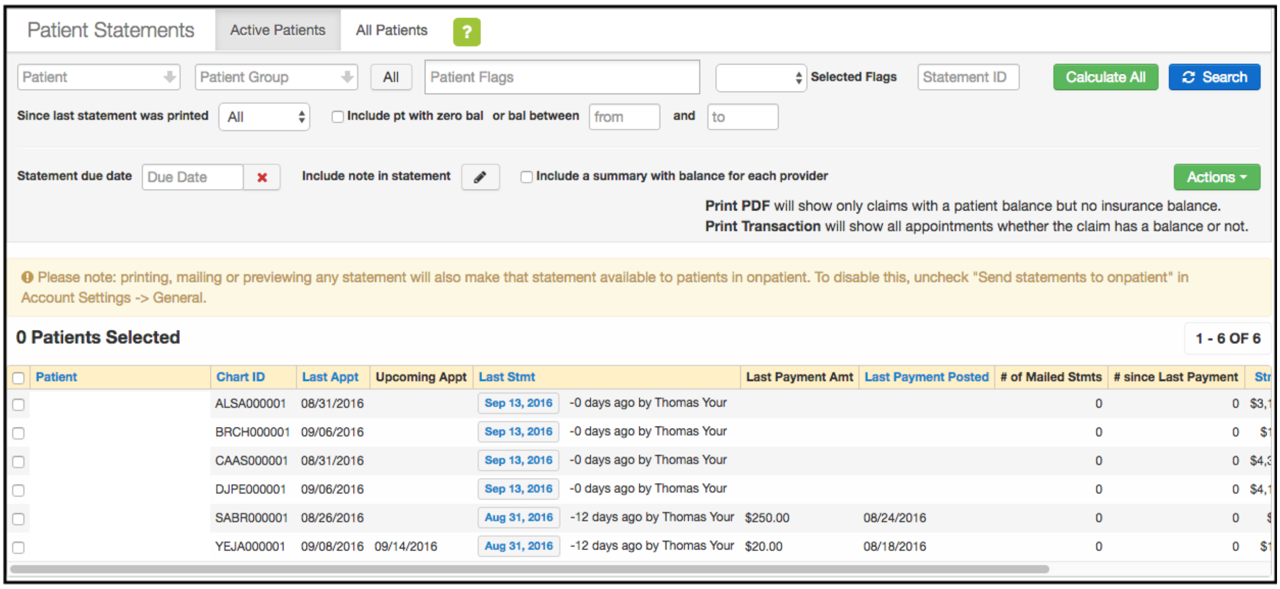
Patient Statements with Optum

Last modified on 09/19/2024 10:48 am EDT

Patient Statements through Optum

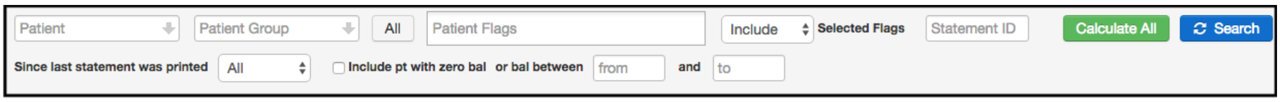
On DrChrono's Apollo or Apollo Plus plan, you can send and manage your patient statements through the **Patient Statements** page.

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.



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

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



- **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**: 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.

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:	$	

MAKE CHECKS PAYABLE / REMIT TO:

Employee Test
1 Main St
Unit 1
Mountain View CA 49040

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

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

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**

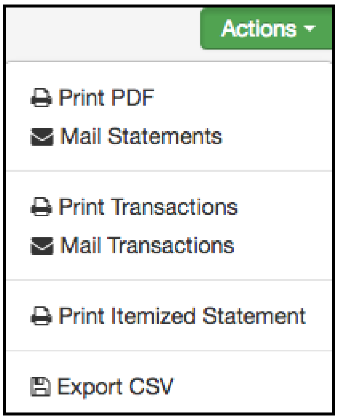
For questions about billing, call . To pay by credit card, call .
You can also pay by credit card online at onpatient.com - If you don't have access, call to request an account.
Accepted Credit Card(s): Visa, Mastercard, Discover, American Express

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.