

# Creating an Itemized Patient Statement

07/08/2024 7:36 pm EDT

DrChrono allows you to generate a single report for a patient with their insurance information, a summary of their balance, and all of their financial transactions.

1. To do this first hover over the **Billing** tab and select **Patient Statements**

**Billing** Account Marketplace

**BILLING**

- Billing Summary
- Live Claims Feed
- Patient Payments
- Day Sheet
- Transactions
- Remittance Reports
- Unmatched ERAs
- Insurance Credit Card Payments
- Accounts Receivable
- Patient Statements**
- Product/Procedure
- Patient Balance Ledger
- Fee Schedule
- Underpaid Items
- Adjustment Master
- Sales Tax
- Billing Log

2. Select a patient from the list by checking the box next to their name.

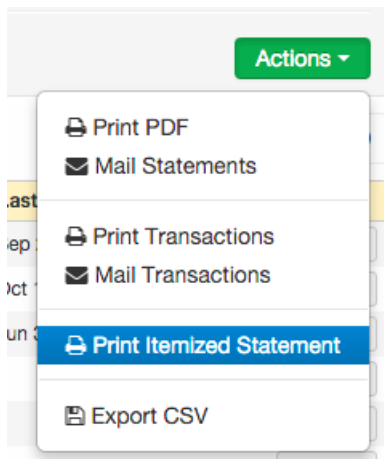
1 Patients Selected Deselect All 1 - 10 OF 10

<input type="checkbox"/>	Patient	Chart ID	Last Appt	Upcoming Appt	Last Stmt	# of Mailed Stmts	Stmt Bal	Last Updated	
<input type="checkbox"/>	Fozzie Bear	BEFO000001	09/23/2015			0	\$1,080.00	Sep 24, 2015 5:42:10 AM	<a href="#">Preview</a>
<input checked="" type="checkbox"/>	Gonzo t. Greatest	GRGO000001	10/27/2015	10/28/2015	Jul 15, 2015 -103 days ago by Kalin Showers	0	\$5,000.00	Oct 14, 2015 4:50:53 PM	<a href="#">Preview</a>
<input type="checkbox"/>	Waldorf Heckler	HEWA000001	06/29/2015			0	\$200.00	Jun 30, 2015 5:43:15 AM	<a href="#">Preview</a>
<input type="checkbox"/>	Amanda Jones	JOAM000001	01/17/2015			0	\$200.00		<a href="#">Preview</a>
<input type="checkbox"/>	Craig Moke	MOCR000001	01/16/2015			0	\$2,860.00		<a href="#">Preview</a>
<input type="checkbox"/>	Miss piggy	PIMI000001	06/02/2015			0	\$200.00	Jun 2, 2015 5:39:40 AM	<a href="#">Preview</a>
<input type="checkbox"/>	Piggy Pig	PIPI000001	06/23/2015			0	\$400.00	Sep 10, 2015 5:42:16 AM	<a href="#">Preview</a>
<input type="checkbox"/>	Rizzo Rat	RARI000001	10/26/2015			0	\$982.00	Oct 15, 2015 5:10:59 PM	<a href="#">Preview</a>
<input type="checkbox"/>	Kalin Showers	SHKA000001	07/28/2015			0	\$50.00	Jul 28, 2015 5:40:42 AM	<a href="#">Preview</a>
<input type="checkbox"/>	Amy Smith	SMAM000001	01/16/2015			0	\$550.00		<a href="#">Preview</a>

The patients listed above are sample patients with test data.

3. Click the green **Actions** button and select either **Print Itemized Statement** or **Print PDF** from the drop-down.

- Print Itemized Statement will give you a very detailed breakdown of the patient's account.
- Print PDF will give you a summary, listing the current balance due from the patient.



4. A PDF of the statement will be generated in your message center where you can print it for the patient.

	From	Title	Assigned to	Workflow	Date
<input type="checkbox"/>	☆ drchrono	Generated PDF: itemized_statements_10_27_15.pdf	Kalin Showers		Oct 27, 4:47 p.m.

This is the detailed Itemized Statement (Print Itemized Statement):

Generated PDF: itemized\_statements\_10\_27\_15.pdf Assign to: Kalin Showers as Open Assign

From: drchrono Tuesday, October 27, 2015 4:47 PM

[Save Attachment to Patient Chart](#) [View Document](#) [Audit Log](#) ☆

Notes + Add

Rotate all pages to: Clockwise Counter Clockwise

---

123 Wildwood Ave  
new york, NY, 91201

---

**Patient Demographics**

<b>First Name</b>	Gonzo	<b>Street Address</b>	12334 None
<b>Nick Name</b>		<b>Zip Code</b>	94089
<b>Middle Name</b>	the	<b>City</b>	Sunnyvale
<b>Last Name</b>	Greatest	<b>State</b>	CA
<b>Suffix</b>		<b>Emerg Cont Name</b>	Rizzo
<b>Home #</b>		<b>Emerg Cont Phone</b>	
<b>Cell #</b>	123-123-1234	<b>Emerg Cont Relation</b>	Best Friend
<b>Work #</b>	123-123-1234	<b>Employer</b>	The Muppet Show
<b>Email</b>	kalin.showers+drchronogonzo@gmail.com	<b>Employer Zip Code</b>	94089
<b>Social Security #</b>	123-12-1234	<b>Employer Address</b>	123 Wildwood Ave

Here is the summary (Print PDF):

**RANDI INC**  
 190 Maryland Ave  
 Pasadena, MD 21122

<b>Statement ID:</b> 124560-87286329-8475984		
<b>Statement Date</b>	<b>Pay This Amount</b>	<b>Chart ID</b>
07/27/2020	\$305.00	HAJE000001
<b>SHOW AMOUNT PAID HERE:</b>	\$	

**Edward**  
 2 Castro Street  
 Mountain View, CA 94040

**MAKE CHECKS PAYABLE / REMIT TO:**  
**RANDI INC**  
 190 Maryland Ave  
 Pasadena, MD 21122

For questions about billing, call (301) 373-2778. To pay by credit card, call .

.....  
 Please detach and return top portion with your payment.

<b>Patient:</b> Jenny Harris	<b>Chart ID:</b> HAJE000001	<b>Statement ID:</b> 124560-87286329-8475984
<b>Responsible Party:</b> Edward		<b>Responsible Party Phone:</b> (516) 232-2325

Date of Service	Provider	Procedure	Mods	Charge	Adjmt	Ins. Paid	Pt Paid	Bal Due
5/04/2020 03:45PM	Randi Beavers	99213 - OFFICE/OUTPATIENT VISIT EST	:::	\$150.00			\$40.00	\$110.00
5/04/2020 03:45PM	Randi Beavers	J3420 - Vitamin b12 injection	:::	\$45.00				\$45.00