

Creating an Itemized Patient Statement

Last modified on 06/13/2025 11:40 am EDT

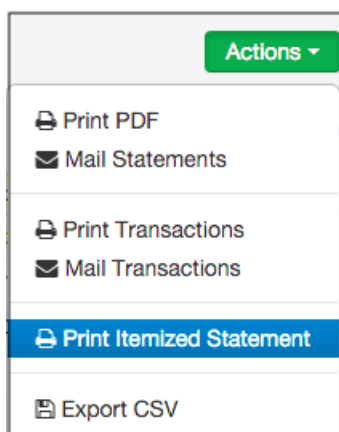
DrChrono allows you to generate a single report for a patient with their insurance information, a summary of their balance, and all of their financial transactions.

1. Hover over the **Billing** tab and select **Patient Statements**
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 Stmt	Stmt Bal	Last Updated	
<input type="checkbox"/>	Fozzie Bear	BEFO000001	09/23/2015			0	\$1,080.00	Sep 24, 2015 5:42:10 AM	Preview
<input checked="" type="checkbox"/>	Gonzo T. Greatest	GRGO000001	10/27/2015	10/28/2015	Jul 15, 2015	0	\$5,000.00	Oct 14, 2015 4:50:53 PM	Preview
<input type="checkbox"/>	Waldorf Heckler	HEWA000001	06/29/2015			0	\$200.00	Jun 30, 2015 5:43:15 AM	Preview
<input type="checkbox"/>	Amanda Jones	JOAM000001	01/17/2015			0	\$200.00		Preview
<input type="checkbox"/>	Craig Moke	MOCR000001	01/16/2015			0	\$2,860.00		Preview
<input type="checkbox"/>	Miss Piggy	PIMI000001	06/02/2015			0	\$200.00	Jun 2, 2015 5:39:40 AM	Preview
<input type="checkbox"/>	Piggy Pig	PIPI000001	06/23/2015			0	\$400.00	Sep 10, 2015 5:42:16 AM	Preview
<input type="checkbox"/>	Rizzo Rat	RARI000001	10/26/2015			0	\$982.00	Oct 15, 2015 5:10:59 PM	Preview
<input type="checkbox"/>	Kalin Showers	SHKA000001	07/28/2015			0	\$50.00	Jul 28, 2015 5:40:42 AM	Preview
<input type="checkbox"/>	Amy Smith	SMAM000001	01/16/2015			0	\$550.00		Preview

The patients listed above are sample patients with test data.

3. Press the green **Actions** button and select either **Print Itemized Statement** or **Print PDF** from the drop-down.
 - a. Print Itemized Statement will give you a very detailed breakdown of the patient's account.
 - b. 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.

<input type="checkbox"/>	From	Title	Assigned to	Workflow	Date
<input type="checkbox"/>	☆ drchrono	Generated PDF: itemized_statements_10_27_15.pdf			

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

Generated PDF: itemized_statements_10_27_15.pdf

Assign toasOpenAssign

From: drchrono

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

First NameGonzo

Nick Name

Middle Namethe

Last NameGreatest

Suffix

Home #

Cell #123-123-1234

Work #123-123-1234

Emailkalin.showers+drchronogonzo@gmail.com

Social Security #123-12-1234

Street Address12334 None

Zip Code94089

CitySunnyvale

StateCA

Emerg Cont NameRizzo

Emerg Cont Phone

Emerg Cont RelationBest Friend

EmployerThe Muppet Show

Employer Zip Code94089

Here is the summary (Print PDF):

Office name and address

Statement ID: 124560-87286329-8475984

Statement Date	Pay This Amount	Chart ID

SHOW AMOUNT PAID HERE:\$

Patient/Responsible Party
name and address

MAKE CHECKS PAYABLE / REMIT TO:

For questions about billing, call

To pay by credit card, call .

.....

Please detach and return top portion with your payment.

Patient:	Chart ID:	Statement ID: 124560-87286329-8475984
Responsible Party:		Responsible Party Phone:

Date of Service	Provider	Procedure	Mods	Charge	Adjmt	Ins. Paid	Pt Paid	Bal Due
		99213 - OFFICE/OUTPATIENT VISIT EST	...	\$150.00			\$40.00	\$110.00
		J3420 - Vitamin b12 injection	...	\$45.00				\$45.00