

Creating an Itemized Patient Statement

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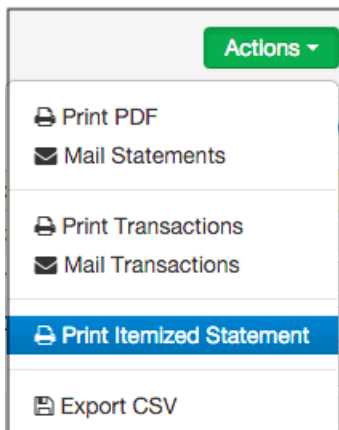
DrChrono allows you to generate a single report for a patient with their insurance information, a summary of their balance, and all of their financial transactions.

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	Stmnt 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.
 - o Print Itemized Statement will give you a very detailed breakdown of the patient's account.
 - o 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 to [] as [Open] [Assign]

From: drchrono

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

Notes [+ Add]

Rotate all pages [] to: [] [Clockwise] [Counter Clockwise]

123 Widwood Ave
new york, NY, 91201

Patient Demographics

First Name	Gonzo	Street Address	12334 None
Nick Name		Zip Code	94089
Middle Name	the	City	Sunnyvale
Last Name	Greatest	State	CA
Suffix		Emerg Cont Name	Rizzo
Home #		Emerg Cont Phone	
Cell #	123-123-1234	Emerg Cont Relation	Best Friend
Work #	123-123-1234	Employer	The Muppet Show
Email	kalin.showers+drchronogonzo@gmail.com	Employer Zip Code	94089
Social Security #	123-12-1234	Employer Address	12345 Main St

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