## **Creating and Managing Patient Statements**

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

- 1. 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.

Patient Statements	Active Pat	ients A	Il Patients ?						
Patient 🔸	Patient Group	+	All Patient	t Flags		Selected	Flags Statement	ID Calculate	All C Search
Since last statement was printed	IIA II	¢ □ Incl	ude pt with zero b	al or bal betw	een from and to				
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3. Select what type of patients you will use: Active Patients or All Patients.

Patient Statements	Active Patients	All Patients	••
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4. Specify what result you are looking for with the following search/filter options.

Patient	Patient Group	IIA 🐺	Patient Flags		Include	Selected Flags	Statement ID	Calculate All	C Search
Since last statement wa	as printed All \$	Include pt wi	th zero bal or bal between	from a	nd to				

- 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 it 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: 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	Due Date	×	Include note in statement	<b>A</b>	Include a summary with balance for each provider
			)		

- 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 contact support and we'll be happy to assist.

• To view your changes or just 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.

Thomas	Your	6 A			Stateme	ent ID: 1009	50-60542942	2-PREVIEW	
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Patient:		Char	rt ID: I	DJPE000	0001	Statemen	t ID: 100950-	60542942-F	PREVIEW
Date of									
Service	Provider	Procedure		Mods	Charge	Adjmt	Ins. Paid	Pt Paid	Bal Du
9/06/2016 12:00AM	Thomas Your	28630 - TREAT TOE DISLOCATION			\$100.00				\$100.00
9/06/2016 12:00AM	Thomas Your	15788 - CHEMICAL PEEL FACE EPIDERM	:::		\$120.00				\$120.00
9/06/2016 12:00AM	Thomas Your	01430 - ANESTH KNEE VEINS SURGERY	:::		\$54.90				\$54.9
9/06/2016 12:00AM	Thomas Your	33310 - EXPLORATORY HEART SURGERY	:::		\$3,000.00				\$3,000.0
9/06/2016 12:00AM	Thomas Your	99213 - OFFICE/OUTPATIENT VISIT EST			\$100.00				\$100.0
9/06/2016 12:00AM	Thomas Your	54231 - DYNAMIC CAVERNOSOMETRY	:::		\$350.00				\$350.0
9/06/2016 12:00AM	Thomas Your	67906 - REPAIR EYELID DEFECT	:::		\$400.00				\$400.0
				Total:	\$4,124.90				\$4,124.90
							Tot	al Amount:	\$4,124.90
		For questions a Accepted Credit Card(s): V	bout b isa, M	illing, ca astercar	ll (650) 690-5 d, Discover, /	5986. American Ex	press		
		Thomas Your , 1001 N Re	engsto	orff Ave	, Mountain \	/iew, CA 94	043		
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Note: At the bottom of the statement there is a line titled **Accepted Credit Cards**. To change the credit cards listed there, go to **Account > Provider Settings > Medical Billing > Patient Statement > Credit Card Accepted** and select or unselect the card options you would like to appear in this section. The **Questions about Billing** phone number will populate from the phone number in your office settings.

Patient Statement	
Business Logo	······
Pay to Address	789 Main Street   Halethorpe   MD   21227
Use Office Name	✓ Use the Practice Official Name (if available) for patient statement and payment receipt.
Pay CC by Call	Show "To pay by credit card, call [office number]" in patient statement.
Credit Card Accepted	Visa
	✓ Mastercard
	✓ Discover
	✓ American Express

If you would like to print your statements or have DrChrono send your statements 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**, Data Media Associates (DMA) will mail your statements for you at the cost of \$0.90 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.

Actions -
➡ Print PDF ■ Mail Statements
Print Transactions Mail Transactions
Print Itemized Statement
Export CSV

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.

Here is a video that will walk you through generating patient statements.