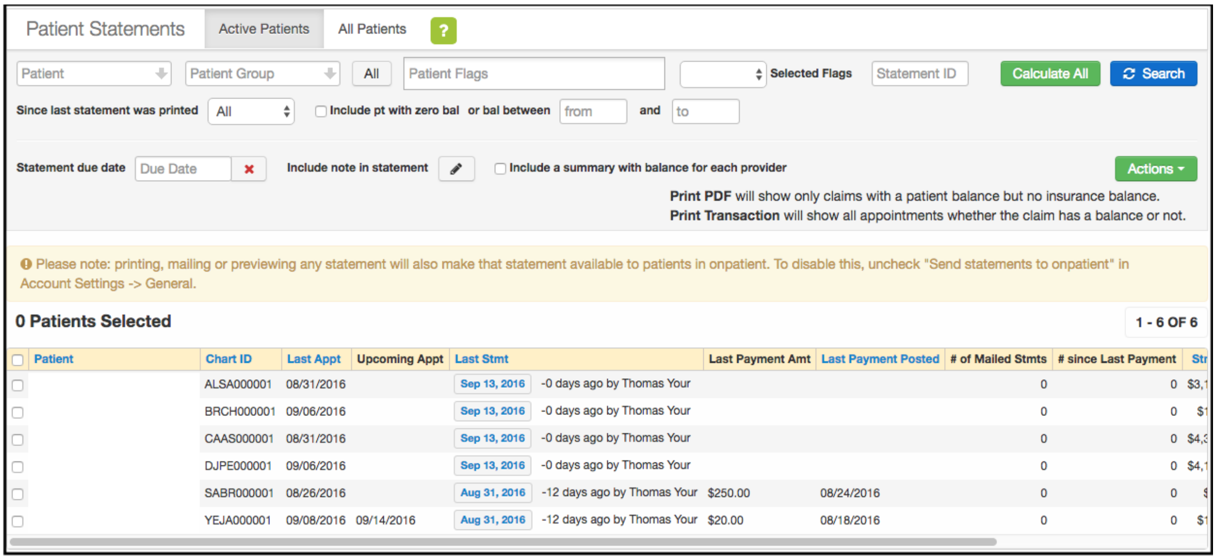
Creating and Managing Patient Statements

Last modified on 06/30/2026 11:33 am EDT

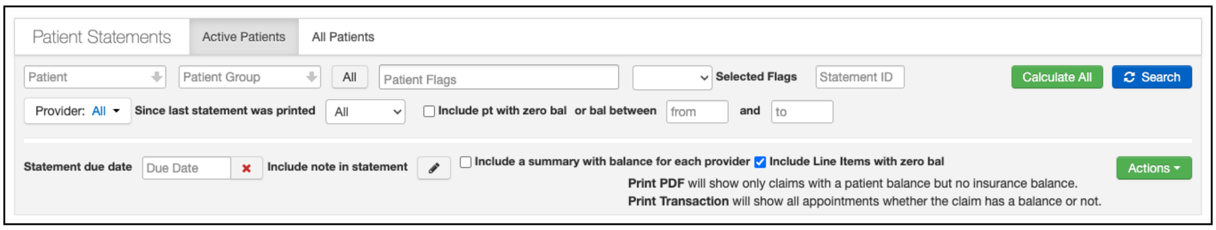
On DrChrono's Apollo or Apollo Plus plan, you have the ability to send and manage your patient statements through the **Patient Statements** page.

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.



3. Select what type of patients you will use: Active Patients or All Patients.

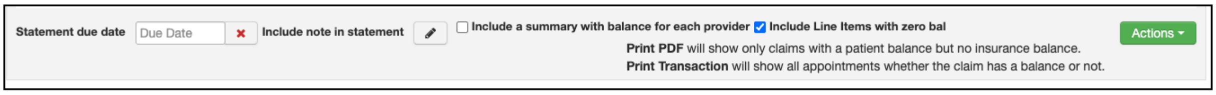
4. Specify what result you are looking for with the following search/filter options.



- **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 it here.
- **Provider**: Select one, multiple, or all providers.
- **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**: 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.
- **Include Line Items with zero bal**: Select whether or not to include line items that have a zero balance.

If you need to **update the phone number** listed for billing questions, please get in touch with support, and we'll be happy to assist.

- To view your changes or just to preview the statement before printing it, 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.

STATEMENT

Billing Office Phone:

COMPLETE AND RETURN IF PAYING BY CREDIT CARD.

CARD NUMBER	SECURITY CODE
NAME ON CARD (PLEASE PRINT)	EXP. DATE
SIGNATURE	AMOUNT

STATEMENT DATE	ACCOUNT #	AMOUNT DUE
06/04/26	HAJE000002	$100.00

Statement ID: 124560-90153821-14164298

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MAKE CHECK PAYABLE AND REMIT TO:

789 Main Street
Baltimore, MD 21126

Jenny Harris
123 Main St
Brooklyn Curtis, MD 21226

DETACH TOP PORTION AND RETURN WITH PAYMENT IN ENCLOSED ENVELOPE

DATE	DESCRIPTION	CHARGES	PYMTS	ADJMTS	BALANCE
	Visit Totals for Claim #207891710 Patient: Jenny	**$100.00**			**$100.00**
	Provider: Location of Service: D Inpatient Hospital				
04/07/2022	97004-OT re-evaluation	$100.00			$100.00
	Deductible: Not Available, Co-Insurance: Not Available, Co-Pay: Not Available, Balance to Patient: $100.00				

Account Information

Statement Date:	**06/04/2026**
Account:	**HAJE000002**
Patient:	**Jenny Harris**
Patient Balance:	**$100.00**

AMOUNT DUE

$100.00

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.

789 Main Street
Baltimore, MD 21126
Billing Office Phone:

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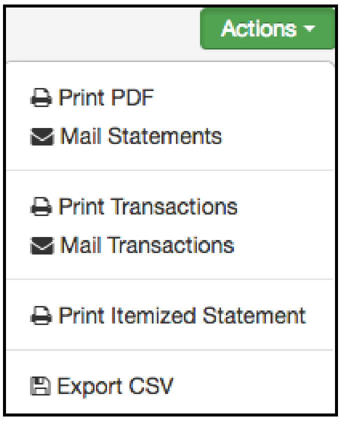
Powered by **DrChrono**

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 the 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.

There is logic built into DrChrono that will permit patient statements to generate only once per eligibile billing cycle when proper criteria is met.

For Apollo Plus plans, please speak to your Billing and/or Account Manager to discuss workflow for patient statements under your plan.