

# 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.

The screenshot shows the 'Patient Statements' interface. At the top, there are tabs for 'Patient Statements', 'Active Patients', and 'All Patients'. Below the tabs are search filters: 'Patient', 'Patient Group', 'All', 'Patient Flags', 'Selected Flags', and 'Statement ID'. There are also buttons for 'Calculate All' and 'Search'. A section for 'Since last statement was printed' includes a dropdown for 'All' and checkboxes for 'Include pt with zero bal' and 'or bal between' with 'from' and 'to' fields. Another section for 'Statement due date' includes a 'Due Date' field, a red 'x' icon, and checkboxes for 'Include note in statement' and 'Include a summary with balance for each provider'. A green 'Actions' button is also present. A note states: 'Print PDF will show only claims with a patient balance but no insurance balance. Print Transaction will show all appointments whether the claim has a balance or not.' A yellow warning box says: 'Please note: printing, mailing or previewing any statement will also make that statement available to patients in onpatient. To disable this, uncheck "Send statements to onpatient" in Account Settings -> General.' Below this, it says '0 Patients Selected' and '1 - 6 OF 6'. A table with columns: Patient, Chart ID, Last Appt, Upcoming Appt, Last Stmt, Last Payment Amt, Last Payment Posted, # of Mailed Stmt, # since Last Payment, and Str. The table contains six rows of patient data.

Patient	Chart ID	Last Appt	Upcoming Appt	Last Stmt	Last Payment Amt	Last Payment Posted	# of Mailed Stmt	# since Last Payment	Str
<input type="checkbox"/>	ALSA000001	08/31/2016		Sep 13, 2016 -0 days ago by Thomas Your			0	0	\$3,1
<input type="checkbox"/>	BRCH000001	09/06/2016		Sep 13, 2016 -0 days ago by Thomas Your			0	0	\$1
<input type="checkbox"/>	CAAS000001	08/31/2016		Sep 13, 2016 -0 days ago by Thomas Your			0	0	\$4,3
<input type="checkbox"/>	DJPE000001	09/06/2016		Sep 13, 2016 -0 days ago by Thomas Your			0	0	\$4,1
<input type="checkbox"/>	SABR000001	08/26/2016		Aug 31, 2016 -12 days ago by Thomas Your	\$250.00	08/24/2016	0	0	\$
<input type="checkbox"/>	YEJA000001	09/08/2016	09/14/2016	Aug 31, 2016 -12 days ago by Thomas Your	\$20.00	08/18/2016	0	0	\$1

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

A close-up of the navigation tabs: 'Patient Statements', 'Active Patients', and 'All Patients'. The 'All Patients' tab is highlighted with a green question mark icon.

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

The screenshot shows the 'Patient Statements' interface with search filters. The 'All Patients' tab is selected. The search filters include: 'Patient', 'Patient Group', 'All', 'Patient Flags', 'Selected Flags', and 'Statement ID'. There are buttons for 'Calculate All' and 'Search'. A section for 'Since last statement was printed' includes a dropdown for 'All' and checkboxes for 'Include pt with zero bal' and 'or bal between' with 'from' and 'to' fields. Another section for 'Statement due date' includes a 'Due Date' field, a red 'x' icon, and checkboxes for 'Include note in statement', 'Include a summary with balance for each provider', and 'Include Line Items with zero bal'. A green 'Actions' button is also present. A note states: 'Print PDF will show only claims with a patient balance but no insurance balance. Print Transaction will show all appointments whether the claim has a balance or not.'

- **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    Include note in statement   Include a summary with balance for each provider  Include Line Items with zero bal

Print PDF will show only claims with a patient balance but no insurance balance.  
Print Transaction will show all appointments whether the claim has a balance or not.

- **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:

**Jenny Harris**  
123 Main St  
Brooklyn Curtis, MD 21226

789 Main Street  
Baltimore, MD 21126

### DETACH TOP PORTION AND RETURN WITH PAYMENT IN ENCLOSED ENVELOPE

DATE	DESCRIPTION	CHARGES	PYMTS	ADJMTS	BALANCE
	<b>Visit Totals for Claim #207891710 Patient: Jenny</b>	<b>\$100.00</b>			<b>\$100.00</b>
	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					

<b>Account Information</b> Statement Date: <b>06/04/2026</b> Account: <b>HAJE000002</b> Patient: <b>Jenny Harris</b> Patient Balance: <b>\$100.00</b>	<b>AMOUNT DUE</b> <b>\$100.00</b>	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.
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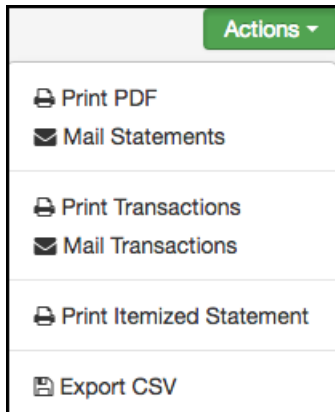
789 Main Street  
Baltimore, MD 21126  
Billing Office Phone: |

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 eligible 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.

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