

Creating and Managing Patient Statements

Last modified on 11/22/2024 9:00 am EST

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' page with the following elements:

- Navigation tabs: Patient Statements, Active Patients, All Patients (with a help icon).
- Search filters: Patient (dropdown), Patient Group (dropdown), All (radio button), Patient Flags (text input), Selected Flags (dropdown), Statement ID (text input), Calculate All (button), Search (button).
- Additional filters: Since last statement was printed (dropdown), Include pt with zero bal (checkbox), or bal between (range input), from (text input), and (text input), to (text input).
- Statement due date (text input), Due Date (checkbox), Include note in statement (checkbox), Include a summary with balance for each provider (checkbox), Actions (dropdown).
- Notes: 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.
- Warning: 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.
- Summary: 0 Patients Selected, 1 - 6 OF 6.
- Table with columns: Patient, Chart ID, Last Appt, Upcoming Appt, Last Stmt, Last Payment Amt, Last Payment Posted, # of Mailed Stmt, # since Last Payment, Str.

| 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.

The image shows three buttons: 'Patient Statements', 'Active Patients', and 'All Patients'. The 'All Patients' button is highlighted with a green question mark icon.

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

The image shows the search and filter options: Patient (dropdown), Patient Group (dropdown), All (radio button), Patient Flags (text input), Include (dropdown), Selected Flags (dropdown), Statement ID (text input), Calculate All (button), Search (button).

- **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 | <input type="text" value="Due Date"/> | <input type="button" value="✖"/> | Include note in statement | <input type="button" value="✎"/> | <input type="checkbox"/> 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.

Once you select **Preview**, you'll be presented with your patient statement in the form of a PDF.

Thomas Your
 1001 N Rengstorff Ave
 Mountain View, CA 94043

| | | |
|--|------------------------|-----------------|
| Statement ID: 100950-60542942-PREVIEW | | |
| Statement Date | Pay This Amount | Chart ID |
| 09/13/2016 | \$4,124.90 | DJPE000001 |
| SHOW AMOUNT PAID HERE: | \$ | |

MAKE CHECKS PAYABLE / REMIT TO:

Thomas Your
 1001 N Rengstorff Ave
 Mountain View, CA 94043

For questions about billing, call (650) 690-5986.

.....
 Please detach and return top portion with your payment.

Sample Note

| | | |
|-----------------|-----------------------------|--|
| Patient: | Chart ID: DJPE000001 | Statement ID: 100950-60542942-PREVIEW |
|-----------------|-----------------------------|--|

| Date of Service | Provider | Procedure | Mods | Charge | Adjmt | Ins. Paid | Pt Paid | Bal Due |
|----------------------|----------------|-------------------------------------|------|---------------|-------------------|-----------|---------|-------------------|
| 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 | | | | \$54.90 |
| 9/06/2016 12:00AM | Thomas Your | 33310 - EXPLORATORY HEART SURGERY | ::: | \$3,000.00 | | | | \$3,000.00 |
| 9/06/2016 12:00AM | Thomas Your | 99213 - OFFICE/OUTPATIENT VISIT EST | ::: | \$100.00 | | | | \$100.00 |
| 9/06/2016 12:00AM | Thomas Your | 54231 - DYNAMIC CAVERNOSOMETRY | ::: | \$350.00 | | | | \$350.00 |
| 9/06/2016 12:00AM | Thomas Your | 67906 - REPAIR EYELID DEFECT | ::: | \$400.00 | | | | \$400.00 |
| | | | | Total: | \$4,124.90 | | | \$4,124.90 |

Total Amount: **\$4,124.90**

For questions about billing, call (650) 690-5986.
Accepted Credit Card(s): Visa, Mastercard, Discover, American Express

Thomas Your , 1001 N Rengstorff Ave , Mountain View, CA 94043

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 Include Business Logo in patient statements.

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**, Change Healthcare (fka Emdeon) 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.