

Creating and Managing Patient Statements

09/03/2024 7:37 am EDT

Creating and Managing Patient Statements

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. At the top, there are tabs for 'Patient Statements', 'Active Patients', and 'All Patients'. Below the tabs are search and filter options: 'Patient', 'Patient Group', 'All', 'Patient Flags', 'Selected Flags', and 'Statement ID'. There are also buttons for 'Calculate All' and 'Search'. Below these are checkboxes for 'Include pt with zero bal' and 'Include a summary with balance for each provider'. A note at the bottom states: '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.'

0 Patients Selected										1 - 6 OF 6	
<input type="checkbox"/>	Patient	Chart ID	Last Appt	Upcoming Appt	Last Stmt	Last Payment Amt	Last Payment Posted	# of Mailed Stmts	# 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 be using: Active Patients or All Patients.

The image shows a close-up of the 'Patient Statements' page tabs. The tabs are '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 image shows a close-up of the search and filter options on the Patient Statements page. It includes fields for 'Patient', 'Patient Group', 'All', 'Patient Flags', 'Include', 'Selected Flags', and 'Statement ID'. There are also buttons for 'Calculate All' and 'Search'. Below these are checkboxes for 'Include pt with zero bal' and 'Include a summary with balance for each provider'.

- **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 that 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:** Include 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="x"/>	Include note in statement	<input type="button" value="edit icon"/>	<input type="checkbox"/> Include a summary with balance for each provider
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- **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 reach out to [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
 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.

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 Please detach and return top portion with your payment.

Sample Note

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

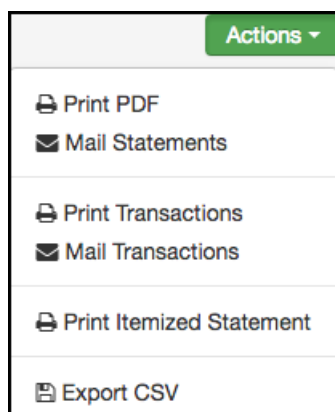
Note: At the bottom of the statement there is a line titled **Accepted Credit Cards**. To change the credit cards listed there, go to **Account > Provider Settings > Medical Billing > Patient Statement > Credit Card Accepted** and select or unselect the card options you would like to appear in this section. The **Questions about Billing** phone number will populate from the phone number in your office settings.

Patient Statement

Business Logo	<input type="text" value="-----"/>	▼	Include Business Logo in patient statements.
Pay to Address	<input type="text" value="-----"/>	▼	789 Main Street Halethorpe MD 21227
Use Office Name	<input checked="" type="checkbox"/>		Use the Practice Official Name (if available) for patient statement and payment receipt.
Pay CC by Call	<input checked="" type="checkbox"/>		Show "To pay by credit card, call [office number]" in patient statement.
Credit Card Accepted	<input checked="" type="checkbox"/>		Visa
	<input checked="" type="checkbox"/>		Mastercard
	<input checked="" type="checkbox"/>		Discover
	<input checked="" type="checkbox"/>		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.



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.
