

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 buttons for 'Calculate All' and 'Search'. Below the filters, there are options for 'Since last statement was printed' (set to 'All') and 'Include pt with zero bal or bal between' (with 'from' and 'to' fields). There are also options for 'Statement due date' (set to 'Due Date'), 'Include note in statement', and 'Include a summary with balance for each provider'. 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 the warning, it says '0 Patients Selected' and '1 - 6 OF 6'. A table lists 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 'Patient Statements' navigation bar showing three 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'. Below the filters, there are options for 'Provider: All', 'Since last statement was printed' (set to 'All'), and 'Include pt with zero bal or bal between' (with 'from' and 'to' fields). There are also options for 'Statement due date' (set to 'Due Date'), 'Include note in statement', 'Include a summary with balance for each provider', and 'Include Line Items with zero bal'. 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.' There is an 'Actions' 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

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
	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.
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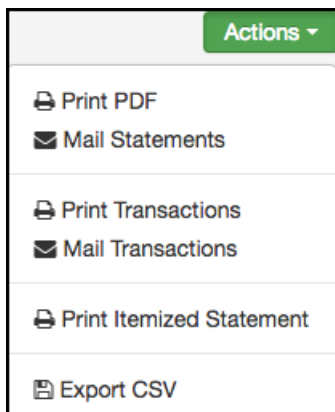
789 Main Street
Baltimore, MD 21126
Billing Office Phone: |

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](#).

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