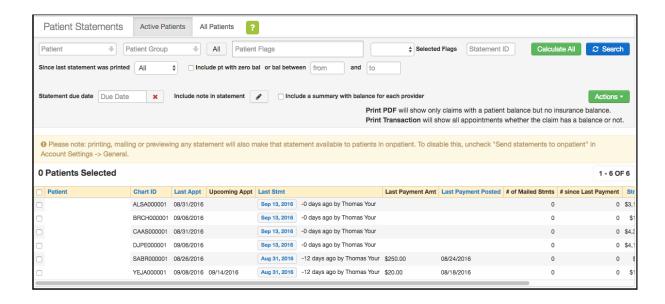
## **Creating and Managing Patient Statements**

Last modified on 11/21/2025 3:00 pm 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.



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.
- Last Statement Printed: The last time a statement was issued to the customer. Your options for search are as follows:
  - o 30+ Days

- 60+ Days
- o 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.

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		28630 - TREAT TOE DISLOCATION	:::		\$100.00				\$100.00
9/06/2016 12:00AM		15788 - CHEMICAL PEEL FACE EPIDERM	:::		\$120.00				\$120.00
9/06/2016 12:00AM		01430 - ANESTH KNEE VEINS SURGERY	:::		\$54.90				\$54.90
9/06/2016 12:00AM		33310 - EXPLORATORY HEART SURGERY	:::		\$3,000.00				\$3,000.00
9/06/2016 12:00AM		99213 - OFFICE/OUTPATIENT VISIT EST	:::		\$100.00				\$100.00
9/06/2016 12:00AM		54231 - DYNAMIC CAVERNOSOMETRY	:::		\$350.00				\$350.00
9/06/2016 12:00AM		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

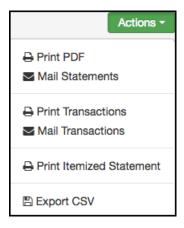
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Note: At the bottom of the statement there is a line titled **Accepted Credit Cards**. To change the credit cards listed there, go to **Account > Provider Settings > Medical Billing > Patient Statement > Credit Card Accepted** and select or unselect 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**, 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 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.