

How to Generate a Statement with the Responsible Party Information?

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If you need to direct a statement to someone other than the patient, perhaps a parent or guardian, you can designate that in their chart. The steps below will show you how to enter the information.

1. Hover over **Patients** and select **Patient List**.
2. Search for the patient by the patient's name or Chart ID.



Manage your existing patients

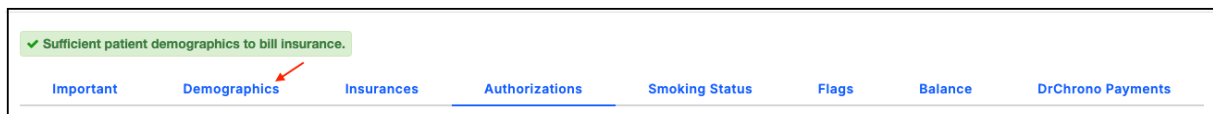
Bulk Import QRDA I Import Export (CSV) Export (C-CDA XML)

Patient search... Search More Filters

+ Add new patient Update patient (via C-CDA XML)

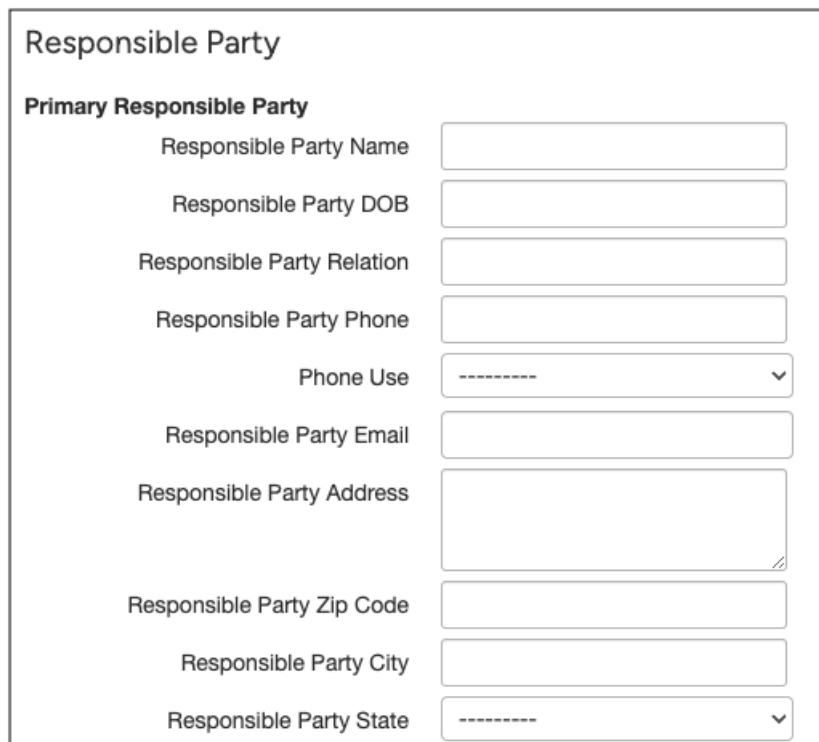
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3. In the Demographics tab, select the Demographics section and scroll down to the **Responsible Party** section. Please enter the information for the responsible party and press **Save demographics**.



✓ Sufficient patient demographics to bill insurance.

Important Demographics Insurances Authorizations Smoking Status Flags Balance DrChrono Payments



Responsible Party

Primary Responsible Party

Responsible Party Name

Responsible Party DOB

Responsible Party Relation

Responsible Party Phone

Phone Use

Responsible Party Email

Responsible Party Address

Responsible Party Zip Code

Responsible Party City

Responsible Party State

Once you update the Responsible Party details in the patient demographics screen, the information will be reflected in the patient statement going forward.
