

How to Generate a Statement with the Responsible Party Information?

08/26/2024 3:43 pm EDT

Adding a Responsible Party to a Patient Statement

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 ?

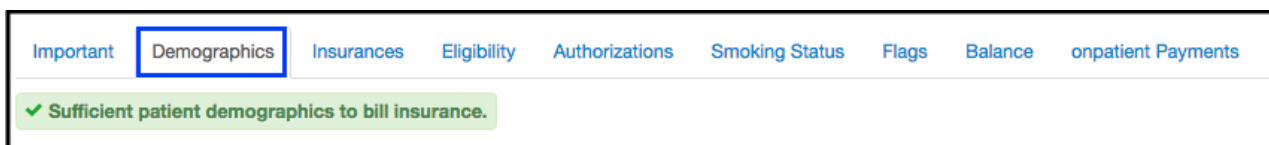
Bulk Import Export (CSV) Export (C-CDA XML)

Patient search... Search More Filters

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

PAGE 1 OF 3 →

3. In the Demographics tab, Click on the Demographics section and scroll down to the **Responsible Party** section. Please enter the responsible party information and click on **Save demographics**.



Important Demographics Insurances Eligibility Authorizations Smoking Status Flags Balance onpatient Payments

✓ Sufficient patient demographics to bill insurance.



Responsible Party

Responsible Party Name

Responsible Party Relation

Responsible Party Phone

Responsible Party Email

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

