How to Include Notes on your Patient Statements

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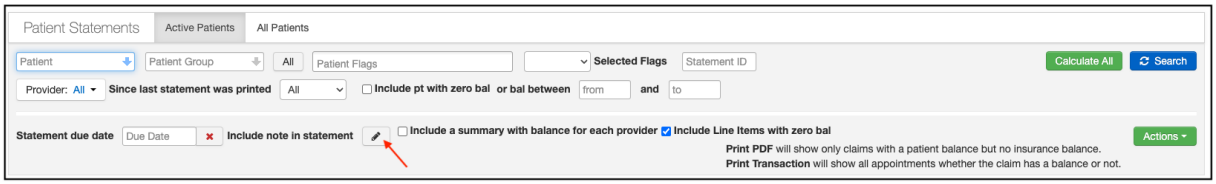
You can add messages such as "To set up a payment plan, please call xxx-xxx-xxxx", "Your Prompt Payment is Appreciated" or anything else you would like to send out on your patient statements.

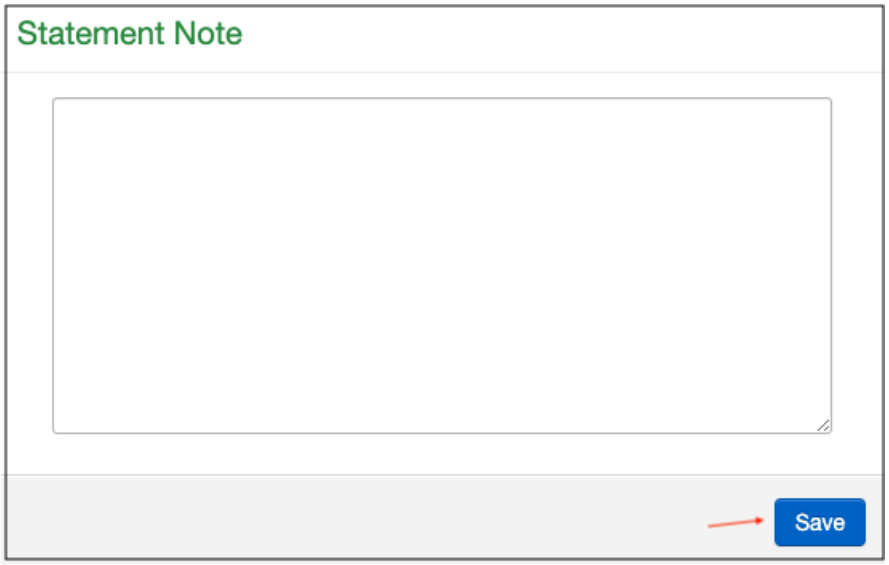
Follow the steps outlined below:

1. Hover the cursor on the **Billing** tab and select **Patient Statements**

2. Select the pencil icon just to the right of the option **Include note in statement**



3. A Statement Note text box will appear that will allow you to enter your custom message. Once done, press **Save**.



Once the changes are saved, the notes will show on your patient statements.

Please note: The notes added are for one-time use, so if you would like them to carry over

from month to month, they will need to be added just before running/printing patient statements.

This feature is implemented to avoid incorrect or outdated notes going out on a patient statement without your knowledge.

Here is a video that will walk you through including notes on your patient statements.