

How to Include Notes on your Patient Statements

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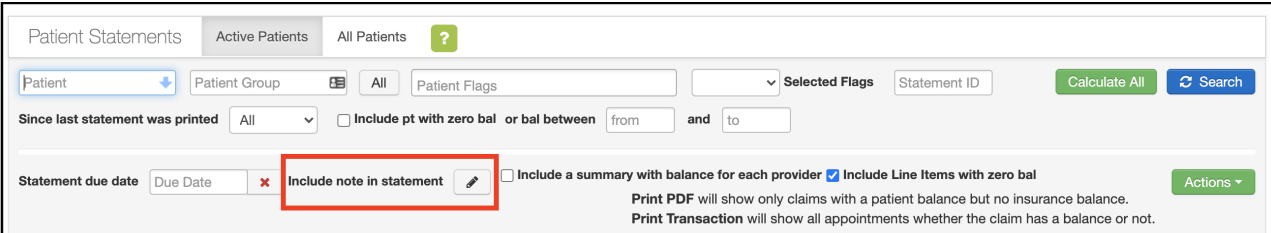
Adding a Note to a Patient Statement

Adding a note to your monthly patient statements in DrChrono is very easy!

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 all of your patient statements.

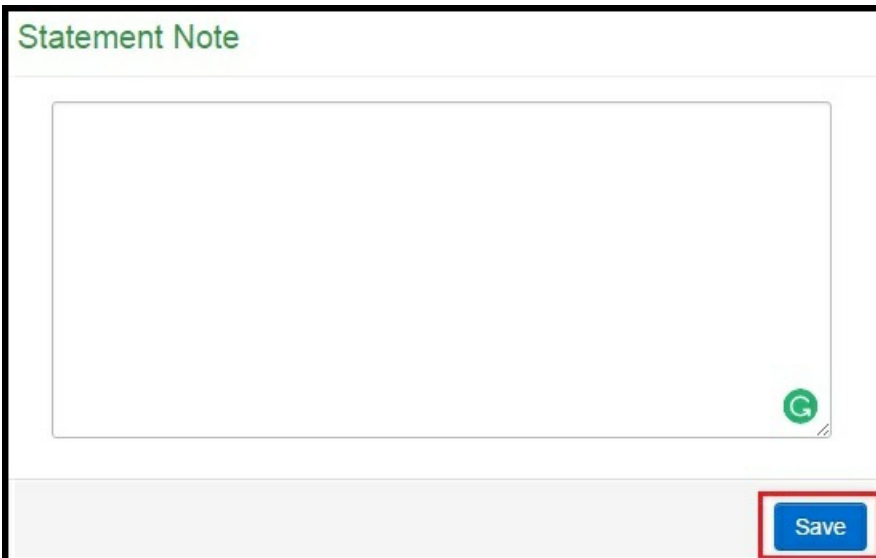
Please follow the steps outlined below:

1. Hover the cursor on the **Billing** tab and select **Patient Statements**.
2. Click on the pencil icon just to the right of the option **Include note in statement**.



The screenshot shows the 'Patient Statements' interface. At the top, there are tabs for 'Active Patients' and 'All Patients'. Below the tabs, there are search and filter options including 'Patient', 'Patient Group', 'All', 'Patient Flags', 'Selected Flags', and 'Statement ID'. There are also buttons for 'Calculate All' and 'Search'. Below these, there are options for 'Since last statement was printed' (set to 'All') and checkboxes for 'Include pt with zero bal' and 'Include a summary with balance for each provider'. The 'Include note in statement' option is highlighted with a red box, and it has a pencil icon next to it. To the right of this option, there is a checked checkbox for 'Include Line Items with zero bal' and an 'Actions' dropdown menu. At the bottom right, there are two lines of text: 'Print PDF will show only claims with a patient balance but no insurance balance.' and 'Print Transaction will show all appointments whether the claim has a balance or not.'

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



The screenshot shows a 'Statement Note' text box. The text box is empty and has a green 'G' icon in the bottom right corner. Below the text box, there is a blue 'Save' button highlighted with a red box.

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.
