

# How to Include Notes on your Patient Statements

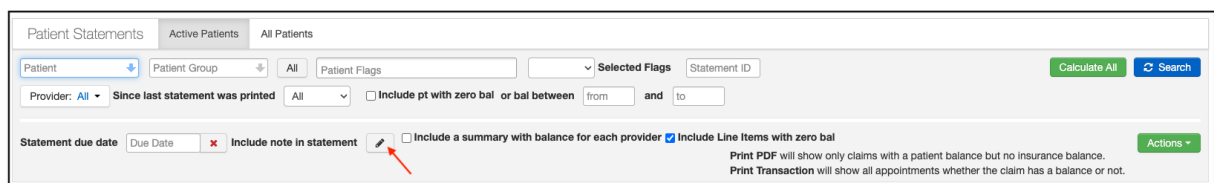
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Adding a note to your monthly patient statements in DrChrono is very easy!

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 your patient statements.

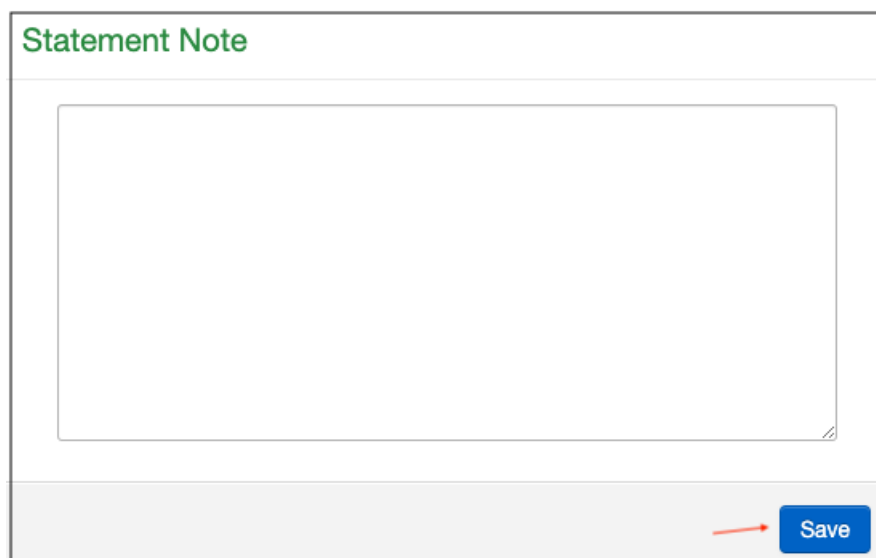
Please follow the steps outlined below:

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**



The screenshot shows the 'Patient Statements' settings page. At the top, there are tabs for 'Patient Statements', 'Active Patients', and 'All Patients'. Below the tabs are various filters and options. A red arrow points to the pencil icon next to the 'Include note in statement' checkbox. Other options include 'Include pt with zero bal', 'Include a summary with balance for each provider', and 'Include Line Items with zero bal'. There are also buttons for 'Calculate All', 'Search', and 'Actions'.

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



The screenshot shows a 'Statement Note' text box. The title 'Statement Note' is in green. Below the title is a large, empty text area for entering a custom message. At the bottom right of the text area is a blue 'Save' button. A red arrow points to the 'Save' button.

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This feature is implemented to avoid incorrect or outdated notes going out on a patient statement without your knowledge.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

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