

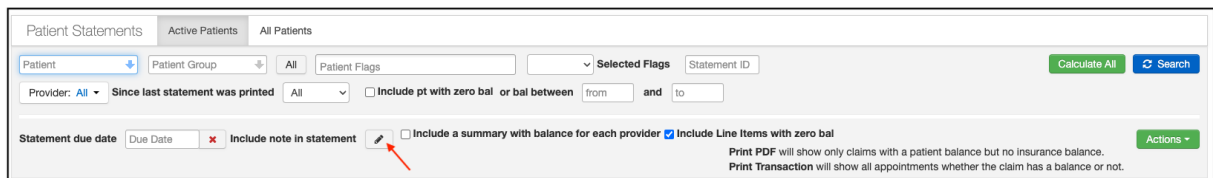
How to Include Notes on your Patient Statements

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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.

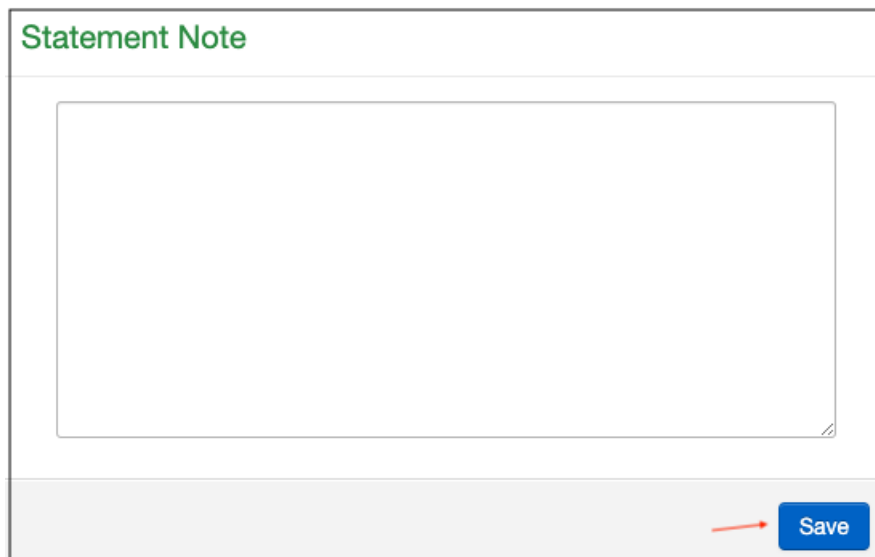
Follow the steps outlined below:

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**



The screenshot shows the 'Patient Statements' interface. At the top, there are tabs for 'Active Patients' and 'All Patients'. Below the tabs, there are several filters and options: 'Patient' (dropdown), 'Patient Group' (dropdown), 'All' (dropdown), 'Patient Flags' (input), 'Selected Flags' (dropdown), and 'Statement ID' (input). There are also buttons for 'Calculate All' and 'Search'. Below these, there are more filters: 'Provider: All', 'Since last statement was printed' (dropdown), 'All' (dropdown), and 'Include pt with zero bal or bal between' (checkbox). There are also 'from' and 'to' input fields. At the bottom, there are checkboxes for 'Include note in statement' (with a pencil icon), 'Include a summary with balance for each provider', and 'Include Line Items with zero bal'. There is also a 'Statement due date' field with a 'Due Date' label and a red 'x' icon. A red arrow points to the pencil icon next to 'Include note in statement'. On the right side, there are buttons for 'Print PDF' and 'Print Transaction' with explanatory text below them, and an 'Actions' dropdown menu.

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 text box is empty and has a light gray border. Below the text box, there is a blue 'Save' button with a white arrow pointing to it. The background is light gray.

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.
