

Setting Up and Generating Office-Based Patient Statements

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Overview

If your practice group has more than one office, you can now generate a separate patient statement for each office instead of one combined statement covering all offices. This makes it easier to reconcile charges and balances by office, especially for clients with office-level merchant IDs.

This feature is called **Office-Based Statement Splitting**. It's disabled by default, and your practice's Primary Provider must enable it.



Note: This feature does not change anything for single-office practices or practices that prefer to send a single statement, using a single merchant ID for all offices. If your practice group has only one office or prefers to send consolidated statements, statements will continue to work exactly as they do today.

Turning on Office-Based Statement Splitting

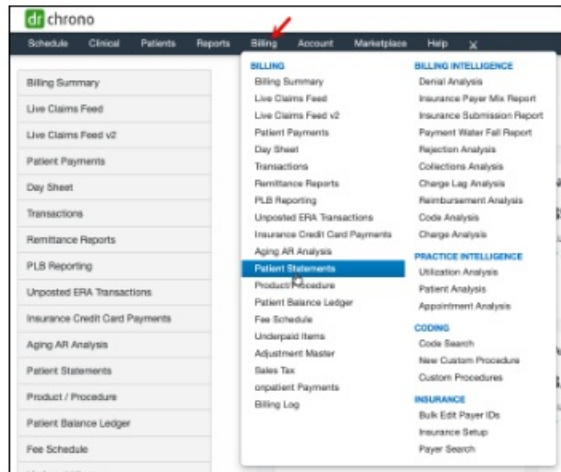
1. Log in as the **Primary Provider** of the practice. Only the Primary Provider can see and change this setting.
2. Navigate to **Account > Account Settings > Medical Billing**.
3. Find the **Enable Office-Based Statement Splitting** checkbox, located directly below **Enable Enhanced Statements**.
4. Check the box to turn the feature on.

Once enabled, an **Office** option becomes available wherever patient statements are generated or viewed.

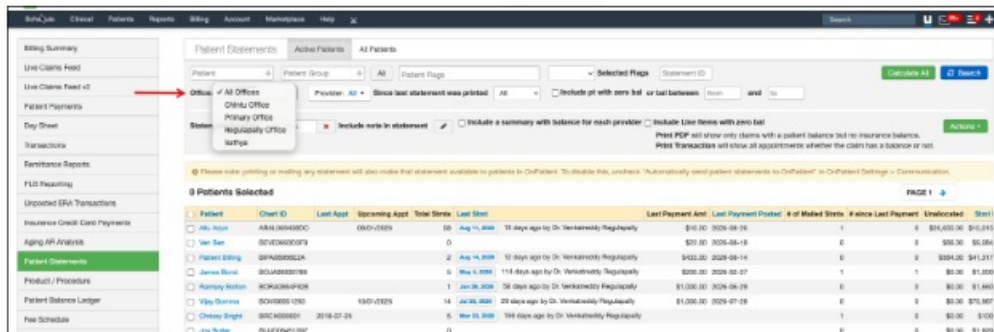
<screenshot>

Generating Statements by Office

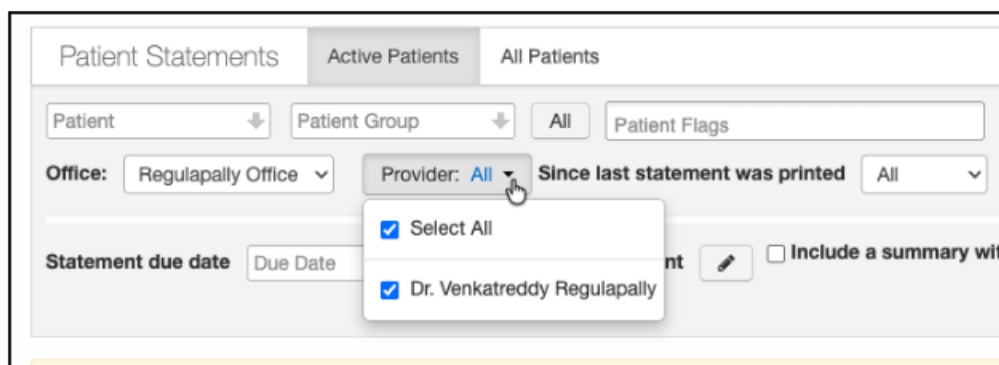
1. Navigate to **Billing > Patient Statements**.



2. Use the new **Office** dropdown filter to choose a specific office, or leave it set to **All Offices**.



- The dropdown only appears if your practice has two or more offices and the setting above is turned on.
- Selecting an office narrows the patient list to those with appointments at that office, and shows each patient's balance for that office only.
- The Provider dropdown updates to show only providers associated with the selected office.



3. Generate statements as you normally would (Print Transactions or Mail Transactions). When an office is selected, the resulting statements are scoped to that office only - they include only that office's address, charges, and balance due.

A patient who has a balance at more than one office will receive one statement per office rather than a single combined statement.

Where You'll See the Office on a Statement

Once a statement has been generated for a specific office, the office name appears in a few places:

- Patient Demographics > Balance tab > Last Patient Statements— a new Office column shows which office each statement was generated for.

The screenshot shows the 'Patient Demographics' section with the 'Balance' tab selected. A red arrow points to the 'Balance' tab. Below the 'Patient Account Balance' summary, there is a 'Patient Follow-Up' section and a 'Last Patient Statements' table. The 'Last Patient Statements' table has columns: Last Statement Date, Office, Status, Created By, Type, Balance, and Action. The 'Office' column is highlighted with a red box.

- Billing > Patient Payments > (select a patient) > Statement tab— the same Office column appears here.

The screenshot shows the 'Patient Payments' section with the 'Statements' tab selected. A red arrow points to the 'Statements' tab. Below the search filters, there is a table with columns: Statement Date, Office, Provider, Balance, Type, and Created By. The 'Office' column is highlighted with a red box.

Statements generated before this feature was enabled, or generated at the practice level, will show a blank Office column — this is expected and doesn't indicate an error.

Frequently Asked Questions

Do I have to use this feature?

No. If you leave the setting disabled, statements continue to be generated at the practice level exactly as before.

What happens if I disable the setting after generating office-based statements?

Existing statements maintain office-level information, remaining as they were when generated. New statements will be generated at the practice level.

Can I still see a combined, practice-wide statement?

Yes — leave the Office filter set to **All Offices** when generating or viewing statements.

Related Articles

- [Creating and Managing Patient Statements](#)
 - [How Office-Based Statements Appear to Patients in the Patient Portal \(OnPatient\)](#)
 - [VIDEO: Generating Patient Statements](#)
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