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 on a per-office basis, especially for clients with office-level merchant IDs.

Each office-based statement can also show a name specific to that office, so patients can tell which office billed them.

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

> 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.

Choosing the Name Shown on Office-Based Statements

The name printed on an office-based statement is set per office. It is decided by three settings:

1. **Use Alternative Pay to Address in Patient Statement** and **Pay to Name**. Set per office in **Account > Practice Management > Offices > Billing**, in the Pay to Section.

2. **Use Practice Name** (previously labeled "Use Office Name"). Set in **Account > Provider Settings > Medical Billing**, in the Patient Statements section. Only the label changed: the setting works the same way.

DrChrono picks the name in this order:

1. **Use Alternate Pay to Address checked**: Pay to Name. If Pay to Name is blank, the Office Name, then the Practice Name, then the Provider Name. Use Practice Name is ignored.

2. **Use Alternate Pay to Address unchecked and Use Practice Name checked:** Practice Name. If Practice Name is blank, the Provider Name.

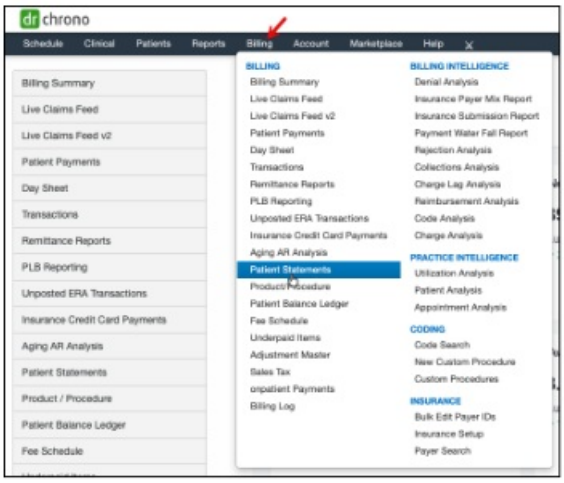
3. **Both unchecked:** Office Name of the office the statement belongs to. If blank, the Practice Name, then the Provider Name.

The same name appears in the statement header, the remit (payment coupon) section, PDFs, and printed copies. Changes apply to statements generated after you save; existing statements are not changed.

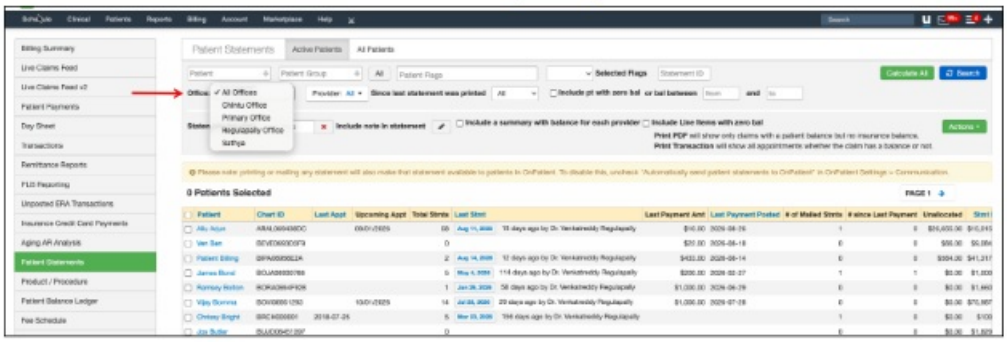
Note: This feature does not change anything for single-office practices or practices that prefer to send a single statement, using a single merchant ID for all offices. If your practice group has only one office or prefers to send consolidated statements, statements will continue to work exactly as they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

Generating Statements by Office

Navigate to **Billing > Patient Statements**.



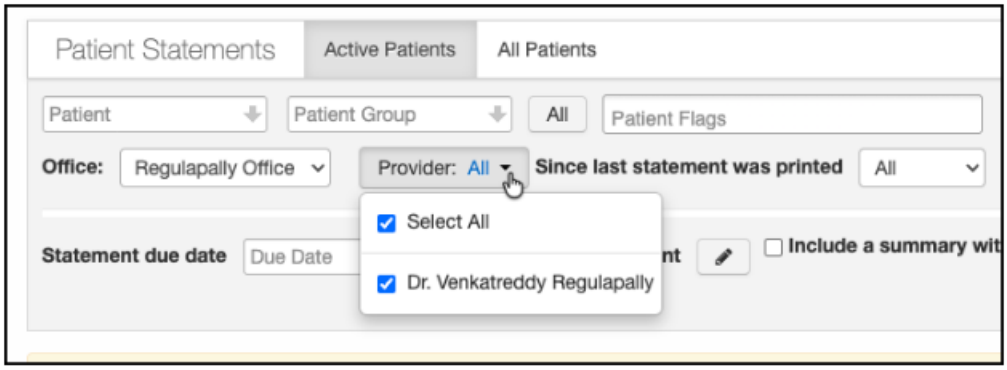
1. Use the new **Office** dropdown filter to choose a specific office, or leave it set to **All Offices**.



a. The dropdown only appears if your practice has two or more offices and the setting above is turned on.

b. Selecting an office narrows the patient list to those with appointments at that office, and shows each patient's balance for that office only.

c. The Provider dropdown updates to show only providers associated with the selected office.



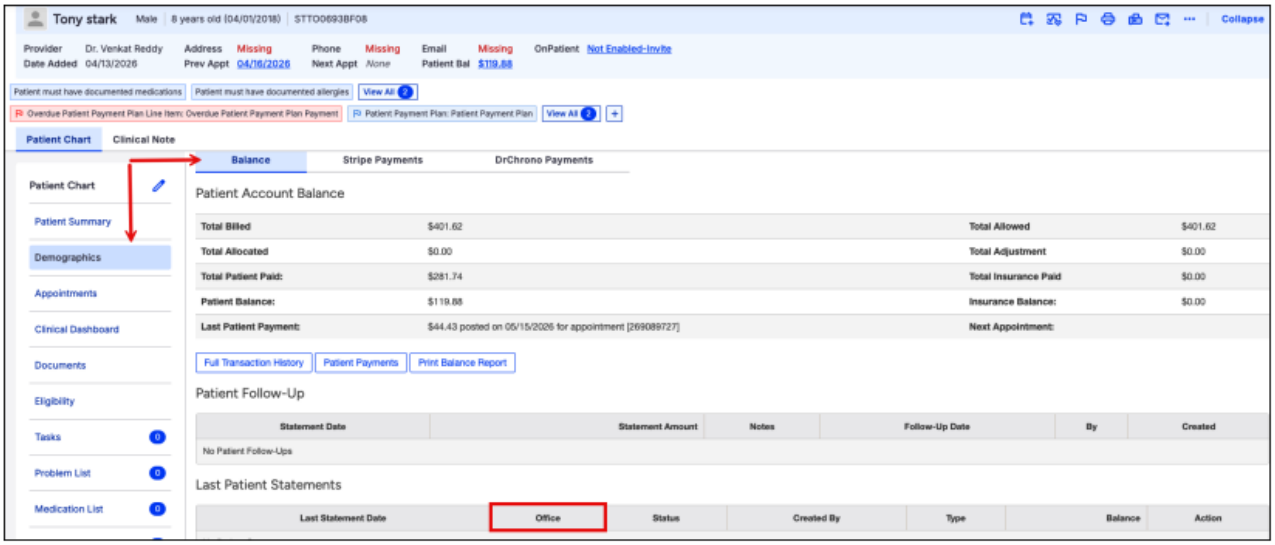
2. Generate statements as you normally would (Print Transactions or Mail Transactions). When an office is selected, the resulting statements are scoped to that office only - they include only that office's name (see above), address, charges, and balance due. If Use Alternate Pay to Address is checked for the office, the alternate pay-to-address is used.

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

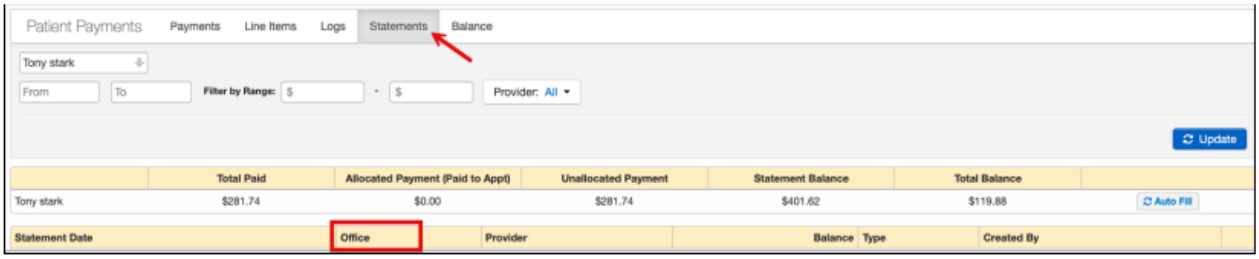
Where You'll See the Office on a Statement

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.



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



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?

No. To send consolidated, practice-wide statements, disable Office-Based Statement Splitting. Statements already generated by office are not changed.

Why does my office-based statement show the office name instead of the provider name?

When both Use Alternate Pay to Address and Use Practice Name are unchecked, office-based statements show the Office Name. To show the practice name instead, check Use Practice Name.

Can I use Pay to Name if my practice doesn't use office-based statements?

Yes. Pay to Name works for all statements when Use Alternate Pay to Address is checked. If Pay to Name is blank on a practice-level statement, the Practice Name is used, then the Provider Name.

What happened to the "Use Office Name" setting?

It was renamed "Use Practice Name" to match what it does. It always used the Practice Name. Your existing selection is unchanged.

Related Articles

- Creating and Managing Patient Statements
- How Office-Based Statements Appear to Patients in the Patient Portal (OnPatient)
- VIDEO: Generating Patient Statements
- Setting Up Office-Level Merchant ID / Payment Routing for Patient Statements
- How can I enter in an official practice name and have that reflected in my clinical notes, superbills, and patient statements?
- How Do I use an Alternative Pay to Address on Patient Statements?