How Office-Based Statements Appear to Patients in the Patient Portal (OnPatient)

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Overview

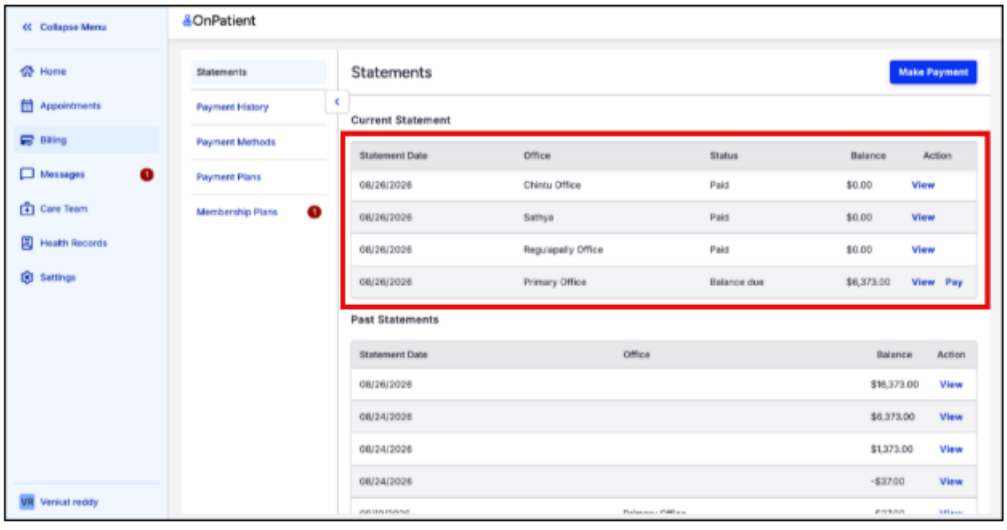
When a practice enables Office-Based Statement Splitting (see “Setting Up and Generating Office-Based Patient Statements”), patients who are seen at more than one office in the practice group will see their statements broken out by office in the OnPatient portal, instead of one combined statement.

This article explains what patients see so your staff can answer questions about it.

What Patients See

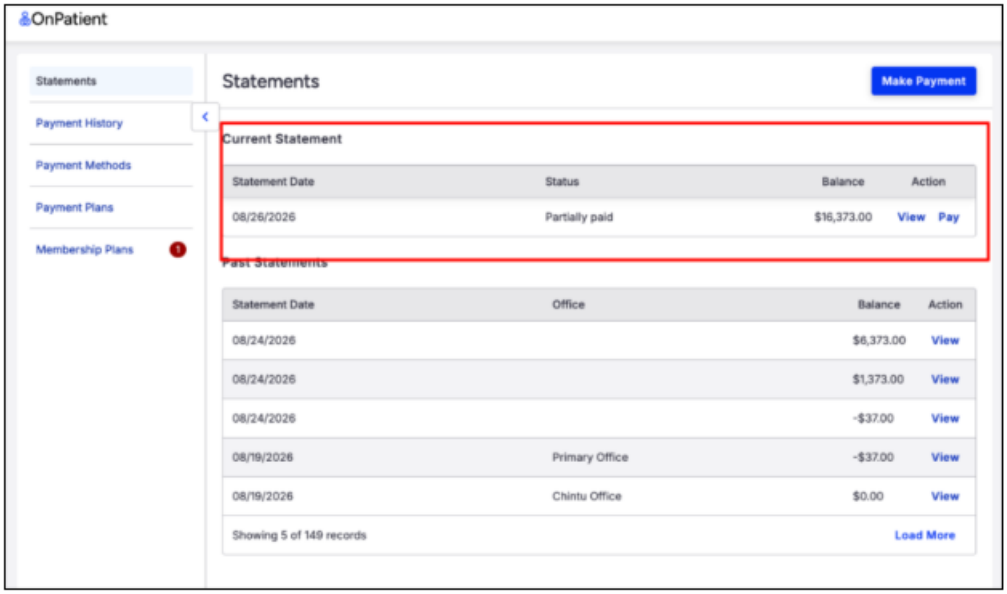
In OnPatient, under the **Statements** tab (both **Current Statements** and **Past Statements**):

- A patient with a balance at more than one office sees **one statement entry per office**, with the office name shown in a new Office column. For example, a patient seen at both “Downtown Clinic” and “Uptown Clinic” would see two separate entries.
- Each entry reflects **that office's own balance and status**. It's possible for one office's statement to show as **Paid** while another office's statement for the same patient still shows a balance due — this is expected and reflects each office's charges independently.
- When the patient opens a statement, the name shown on it follows that office's settings. It may be a custom Pay to Name, the office name, the practice name, or the provider name. See "Choosing the Name Shown on Office-Based Statements" in Setting Up and Generating Office-Based Patient Statments."
- All the usual statement details (dates, amounts, download/view options) remain available on each entry — the only thing that changes is that they're now split out and labeled by office.



When the Office Column Is Blank

If a statement was generated before Office-Based Statement Splitting was turned on, or if the setting is disabled and a combined practice-level statement is generated, it will show with no office name. This is expected — it simply means that the statement covers the whole practice rather than a single office.



Frequently Asked Questions

Will patients at single-office practices notice any change?

No. This only affects patients whose practice group has multiple offices and has enabled the feature.

Why does my patient have two statements now instead of one?

This is expected behavior once Office-Based Statement Splitting is enabled and the patient has charges at more than one office — each office generates its own statement.

Can a patient pay one office's statement without affecting the other?

Yes. Each office's statement and balance are tracked independently.

Why does my patient's statement show a different name than before?

Office-based statements can show the office's own name instead of the provider's name. The name depends on that office's settings. Older statements keep the name they were generated with.

Related Articles

- Setting Up and Generating Office-Based Patient Statements
- Setting Up Office-Level Merchant ID / Payment Routing for Patient Statements
- Creating and Managing Patient Statements
- Video: Generating Patient Statements