

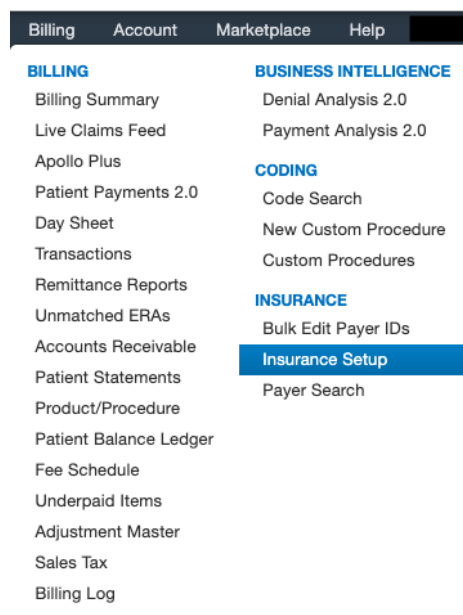
# INTERNAL: Excluding a patient statement by payer

07/24/2024 5:45 pm EDT

There may be some payers where you do not want to generate or send a patient statement. There is a way in DrChrono to prevent patient statements from generating when a patient account has a specific payer ID listed, and that payer ID has had patient statements excluded.

To exclude specific payer(s), please follow the instructions below.

- Navigate to Billing > Insurance Set Up



- If the payer is listed, click on the pencil icon on the right of the screen
- If the payer is not listed, click on + New EDI Enrollment (which could be on the top right or bottom right of your screen, depending on which clearinghouse you use)
- Once you click on the pencil icon, you will see this screen with the payer information listed:

**Add/Edit Payer** ✕

<p>Payer name <input type="text"/></p> <p>Payer id <input type="text"/></p> <p>Insurance Plan Type <input type="text"/></p> <p>Specialty <input type="text"/></p> <p>Billing npi <input type="text"/></p> <p>Eligibility npi <input type="text"/></p> <p>Provider name <input type="text"/></p> <p>Tax id number <input type="text"/></p> <p>Group Provider # <input type="text"/></p> <p>Group provider number qualifier <input type="text"/></p> <p>Individual Provider # <input type="text"/></p> <p>Individual provider number qualifier <input type="text"/></p> <p>Balance billing <input type="text"/></p> <p>Filing limit days <input type="text"/></p>	<p>Send insured signature <input type="checkbox"/></p> <p><small>Print insured person signature in box #13 in HCFA form authorizing insurance payments to billing provider</small></p> <p>Send facility provider number <input type="checkbox"/></p> <p><small>Print Office Facility Provider Number in box #32b in HCFA form</small></p> <p>Send facility information <input type="checkbox"/></p> <p>Processing days <input type="text" value="30"/></p> <p>Referring doctor <input type="text"/></p> <p>Ordering doctor <input type="text"/></p> <p>Rendering taxonomy code <input type="text"/></p> <p>Billing taxonomy code <input type="text"/></p> <p>Payer grouping <input type="text"/></p> <p>Print license numbers in hcfa <input type="checkbox"/></p> <p><small>Print license number on Procedures lines and box #31 in HCFA form</small></p> <p><b>Do not bill patients for balance</b> <input checked="" type="checkbox"/> <b>Yes</b></p>
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Close Save

- If you switch the "Do not bill patients for balance" to Yes, any patient with this payer ID, who has a balance after payment is received, will not generate a patient statement.