

Creating an Itemized Patient Statement

07/24/2024 1:30 pm EDT

DrChrono allows you to generate a single report for a patient with their insurance information, a summary of their balance, and all of their financial transactions.

1. To do this first hover over the **Billing** tab and select **Patient Statements**

Billing Account Marketplace

BILLING

- Billing Summary
- Live Claims Feed
- Patient Payments
- Day Sheet
- Transactions
- Remittance Reports
- Unmatched ERAs
- Insurance Credit Card Payments
- Accounts Receivable
- Patient Statements**
- Product/Procedure
- Patient Balance Ledger
- Fee Schedule
- Underpaid Items
- Adjustment Master
- Sales Tax
- Billing Log

2. Select a patient from the list by checking the box next to their name.

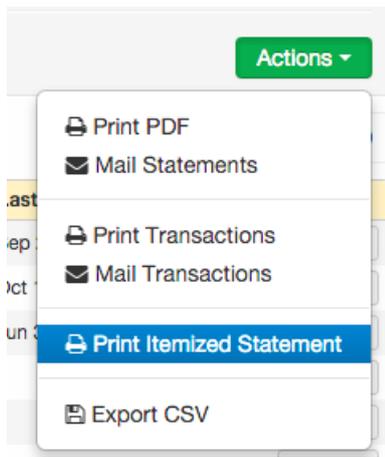
1 Patients Selected Deselect All 1 - 10 OF 10

<input type="checkbox"/>	Patient	Chart ID	Last Appt	Upcoming Appt	Last Stmt	# of Mailed Stmts	Stmt Bal	Last Updated	
<input type="checkbox"/>	Fozzie Bear	BEFO000001	09/23/2015			0	\$1,080.00	Sep 24, 2015 5:42:10 AM	Preview
<input checked="" type="checkbox"/>	Gonzo t. Greatest	GRGO000001	10/27/2015	10/28/2015	Jul 15, 2015 -103 days ago by Kalin Showers	0	\$5,000.00	Oct 14, 2015 4:50:53 PM	Preview
<input type="checkbox"/>	Waldorf Heckler	HEWA000001	06/29/2015			0	\$200.00	Jun 30, 2015 5:43:15 AM	Preview
<input type="checkbox"/>	Amanda Jones	JOAM000001	01/17/2015			0	\$200.00		Preview
<input type="checkbox"/>	Craig Moke	MOCR000001	01/16/2015			0	\$2,860.00		Preview
<input type="checkbox"/>	Miss piggy	PIMI000001	06/02/2015			0	\$200.00	Jun 2, 2015 5:39:40 AM	Preview
<input type="checkbox"/>	Piggy Pig	PIPI000001	06/23/2015			0	\$400.00	Sep 10, 2015 5:42:16 AM	Preview
<input type="checkbox"/>	Rizzo Rat	RARI000001	10/26/2015			0	\$982.00	Oct 15, 2015 5:10:59 PM	Preview
<input type="checkbox"/>	Kalin Showers	SHKA000001	07/28/2015			0	\$50.00	Jul 28, 2015 5:40:42 AM	Preview
<input type="checkbox"/>	Amy Smith	SMAM000001	01/16/2015			0	\$550.00		Preview

The patients listed above are sample patients with test data.

3. Click the green **Actions** button and select either **Print Itemized Statement** or **Print PDF** from the drop-down.

- Print Itemized Statement will give you a very detailed breakdown of the patient's account.
- Print PDF will give you a summary, listing the current balance due from the patient.



4. A PDF of the statement will be generated in your message center where you can print it for the patient.

	From	Title	Assigned to	Workflow	Date
<input type="checkbox"/>	☆ drchrono	Generated PDF: itemized_statements_10_27_15.pdf	Kalin Showers		Oct 27, 4:47 p.m.

This is the detailed Itemized Statement (Print Itemized Statement):

Generated PDF: itemized_statements_10_27_15.pdf Assign to: Kalin Showers as Open Assign

From: drchrono Tuesday, October 27, 2015 4:47 PM

[Save Attachment to Patient Chart](#) [View Document](#) [Audit Log](#) ☆

Notes + Add

Rotate all pages to: Clockwise Counter Clockwise

123 Wildwood Ave
new york, NY, 91201

Patient Demographics

First Name	Gonzo	Street Address	12334 None
Nick Name		Zip Code	94089
Middle Name	the	City	Sunnyvale
Last Name	Greatest	State	CA
Suffix		Emerg Cont Name	Rizzo
Home #		Emerg Cont Phone	
Cell #	123-123-1234	Emerg Cont Relation	Best Friend
Work #	123-123-1234	Employer	The Muppet Show
Email	kalin.showers+drchronogonzo@gmail.com	Employer Zip Code	94089
Social Security #	123-12-1234	Employer Address	123 Wildwood Ave

Here is the summary (Print PDF):

RANDI INC
 190 Maryland Ave
 Pasadena, MD 21122

Statement ID: 124560-87286329-8475984		
Statement Date	Pay This Amount	Chart ID
07/27/2020	\$305.00	HAJE000001
SHOW AMOUNT PAID HERE:	\$	

Edward
 2 Castro Street
 Mountain View, CA 94040

MAKE CHECKS PAYABLE / REMIT TO:
RANDI INC
 190 Maryland Ave
 Pasadena, MD 21122

For questions about billing, call (301) 373-2778. To pay by credit card, call .

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 Please detach and return top portion with your payment.

Patient: Jenny Harris	Chart ID: HAJE000001	Statement ID: 124560-87286329-8475984
Responsible Party: Edward		Responsible Party Phone: (516) 232-2325

Date of Service	Provider	Procedure	Mods	Charge	Adjmt	Ins. Paid	Pt Paid	Bal Due
5/04/2020 03:45PM	Randi Beavers	99213 - OFFICE/OUTPATIENT VISIT EST	:::	\$150.00			\$40.00	\$110.00
5/04/2020 03:45PM	Randi Beavers	J3420 - Vitamin b12 injection	:::	\$45.00				\$45.00