

# Creating and Managing Patient Statements

07/24/2024 1:30 pm EDT

On DrChrono's Apollo or Apollo Plus plan, you have the ability to send and manage your patient statements through the **Patient Statements** page.

- To access your patient statements, hover over **Billing** on your DrChrono navigation bar 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

- Once you select **Patient Statements**, you'll be taken to the Patient Statements page.

Patient Statements **Active Patients** All Patients ?

Patient  Patient Group  All Patient Flags  Selected Flags  Statement ID

Since last statement was printed  All  Include pt with zero bal or bal between from  and to

Statement due date  Due Date   Include note in statement   Include a summary with balance for each provider

**Print PDF** will show only claims with a patient balance but no insurance balance.  
**Print Transaction** will show all appointments whether the claim has a balance or not.

Please note: printing, mailing or previewing any statement will also make that statement available to patients in onpatient. To disable this, uncheck "Send statements to onpatient" in Account Settings -> General.

0 Patients Selected

1 - 6 OF 6

<input type="checkbox"/>	Patient	Chart ID	Last Appt	Upcoming Appt	Last Stmt	Last Payment Amt	Last Payment Posted	# of Mailed Stmts	# since Last Payment	Str
<input type="checkbox"/>		ALSA000001	08/31/2016		Sep 13, 2016 -0 days ago by Thomas Your			0	0	\$3,1
<input type="checkbox"/>		BRCH000001	09/06/2016		Sep 13, 2016 -0 days ago by Thomas Your			0	0	\$1
<input type="checkbox"/>		CAAS000001	08/31/2016		Sep 13, 2016 -0 days ago by Thomas Your			0	0	\$4,5
<input type="checkbox"/>		DJPE000001	09/06/2016		Sep 13, 2016 -0 days ago by Thomas Your			0	0	\$4,1
<input type="checkbox"/>		SABR000001	08/26/2016		Aug 31, 2016 -12 days ago by Thomas Your	\$250.00	08/24/2016	0	0	\$
<input type="checkbox"/>		YEJA000001	09/08/2016	09/14/2016	Aug 31, 2016 -12 days ago by Thomas Your	\$20.00	08/18/2016	0	0	\$

- To begin, select what type of patients you will be using: Active Patients or All Patients.

Patient Statements **Active Patients** All Patients ?

- Specify what result you are looking for with the following search/filter options.

Patient Patient Group All Patient Flags Include Selected Flags Statement ID Calculate All Search

Since last statement was printed All  Include pt with zero bal or bal between from and to

- **Patient:** The patient's name. Fill out this field if you are looking for a specific patient.
- **Patient Group:** Search for patients that fall within a certain patient group (Patients > Patient Groups)
- **Patient Flags:** Search for patients that have a certain patient flag (Patients > Patient Flags)
- **Include/Exclude:** For the flag field, you can choose to include/exclude to include/exclude results with certain patient flags.
- **Statement ID:** If you know the statement ID of the statement you are searching for, you may enter that here.
- **Last Statement Printed:** The last time a statement was issued to the customer. Your options for search are as follows:
  - 30+ Days
  - 60+ Days
  - 90+ Days
  - 6+ Months
  - 1+ Year
- **Include Patient with Zero Balance:** Include patients who have paid off their balance.
- **Balance Range:** Search for a certain balance range.
- Below the search options, you have the statement modifiers and actions.

Statement due date Due Date   Include note in statement   Include a summary with balance for each provider

- **Statement Due Date:** Insert a due date for your patient on the statement.
- **Include Note in Statement:** Insert a note on the statement.
- **Include a Summary with Balance for Each Provider:** Add a balance breakdown for each provider.

If you need to **update the phone number** listed to call if the patient has billing questions, please reach out to [support](#) and we'll be happy to assist.

- To view your changes or just to preview the statement before printing them, select **Preview** to the right of your patient in the results.

[Preview](#)

Once you select **Preview**, you'll be presented with your patient statement in the form of a PDF.

**Thomas Your**  
 1001 N Rengstorff Ave  
 Mountain View, CA 94043

<b>Statement ID: 100950-60542942-PREVIEW</b>		
<b>Statement Date</b>	<b>Pay This Amount</b>	<b>Chart ID</b>
09/13/2016	\$4,124.90	DJPE000001
<b>SHOW AMOUNT PAID HERE:</b>	<b>\$</b>	

**MAKE CHECKS PAYABLE / REMIT TO:**

**Thomas Your**  
 1001 N Rengstorff Ave  
 Mountain View, CA 94043

For questions about billing, call (650) 690-5986.

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 Please detach and return top portion with your payment.

Sample Note

<b>Patient:</b>	<b>Chart ID: DJPE000001</b>	<b>Statement ID: 100950-60542942-PREVIEW</b>
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Date of Service	Provider	Procedure	Mods	Charge	Adjmt	Ins. Paid	Pt Paid	Bal Due
9/06/2016 12:00AM	Thomas Your	28630 - TREAT TOE DISLOCATION	:::	\$100.00				\$100.00
9/06/2016 12:00AM	Thomas Your	15788 - CHEMICAL PEEL FACE EPIDERM	:::	\$120.00				\$120.00
9/06/2016 12:00AM	Thomas Your	01430 - ANESTH KNEE VEINS SURGERY	:::	\$54.90				\$54.90
9/06/2016 12:00AM	Thomas Your	33310 - EXPLORATORY HEART SURGERY	:::	\$3,000.00				\$3,000.00
9/06/2016 12:00AM	Thomas Your	99213 - OFFICE/OUTPATIENT VISIT EST	:::	\$100.00				\$100.00
9/06/2016 12:00AM	Thomas Your	54231 - DYNAMIC CAVERNOSOMETRY	:::	\$350.00				\$350.00
9/06/2016 12:00AM	Thomas Your	67906 - REPAIR EYELID DEFECT	:::	\$400.00				\$400.00
				<b>Total:</b>	<b>\$4,124.90</b>			<b>\$4,124.90</b>

Total Amount: **\$4,124.90**

For questions about billing, call (650) 690-5986.

**Accepted Credit Card(s):** Visa, Mastercard, Discover, American Express

**Thomas Your , 1001 N Rengstorff Ave , Mountain View, CA 94043**

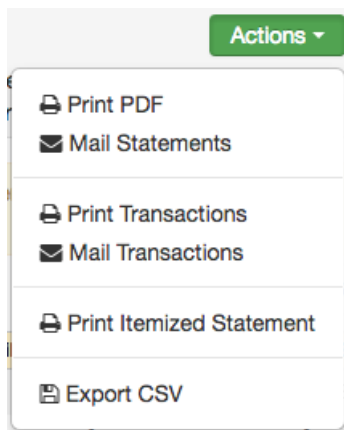
Note: At the bottom of the statement there is a line titled **Accepted Credit Cards**. To change the credit cards listed there, go to **Account > Provider Settings > Medical Billing > Patient Statement > Credit Card Accepted** and select or unselect the card options you would like to appear in this section. The **Questions about Billing** phone number will populate from the phone number in your office settings.

## Patient Statement

Business Logo	<input type="text"/>	Include Business Logo in patient statements.
Pay to Address	<input type="text"/>	789 Main Street   Halethorpe   MD   21227
Use Office Name	<input checked="" type="checkbox"/>	Use the Practice Official Name (if available) for patient statement and payment receipt.
Pay CC by Call	<input checked="" type="checkbox"/>	Show "To pay by credit card, call [office number]" in patient statement.
Credit Card Accepted	<input checked="" type="checkbox"/>	Visa
	<input checked="" type="checkbox"/>	Mastercard
	<input checked="" type="checkbox"/>	Discover
	<input checked="" type="checkbox"/>	American Express

If you would like to print your statements or have DrChrono send your statements for you, first select the patients you would like to send statements to, then select Print PDF or Mail Statements in the Actions menu.

- If you select **Mail Statement**, Change Healthcare (fka Emdeon) will mail your statements for you at the cost of \$0.78 per statement.
- Likewise, you can **print/mail transactions** and produce an itemized statement or a CSV file for each patient that can then be handed to or mailed to a patient.



Patient statements can also be automatically sent to your patient's OnPatient account. If you would like to enable that feature, follow the guide found [here](#).

For Apollo Plus plans, please speak to your Billing and/or Account Manager to discuss workflow for patient statements under your plan.

Here is a [video](#) that will walk you through generating patient statements.