How to Generate a Statement with the Responsible Party Information?

07/24/2024 4:50 pm EDT

Patients

If you need to direct a statement to someone other than the patient, perhaps a parent or guardian, you can designate that in their chart. The steps below will show you how to enter the information.

• Hover over Patients and select Patient List.

	,						
PATIENT							
Patient List							
Consent Forms							
Patient Flags							
Patient Groups							
Send Email							
Send Referral							
• Search for the p	patient by th	e patient's nam	ne or Chart IE).			
Manage your existing	g patients	?			Bulk Import	Export (CSV)	Export (C-CDA XML)
Patient search	Search						More Filters
+ Add new patient	tient (via C-CDA XML)						PAGE 1 OF 3 🔶

• In the Demographics tab, Click on the Demographics section and scroll down to the **Responsible Party** section. Please enter the responsible party information and click on **Save demographics**.

Important Demographics	Insurances	Eligibility	Authorizations	Smoking Status	Flags	Balance	onpatient Payments
✓ Sufficient patient demograph	hics to bill ins	urance.					
Responsible Party							
Responsible Party Nan	ne						
Responsible Party Relation	on						
Responsible Party Phore	ne						
Responsible Party Em	ail						

Once you update the Responsible Party details in the patient demographics screen, the information will reflect on the patient statement going forward.