How to Include Notes on your Patient Statements

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Adding a note to your monthly patient statements in DrChrono is very easy!

You can add messages such as "To set up a payment plan, please call xxx-xxx-xxxx", "Your Prompt Payment is Appreciated" or anything else you would like to send out on all of your patient statements.

Please follow the steps outlined below:

1. Hover the cursor on 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. Click on the pencil icon just to the right of the option Include note in statement.

Patient Statements Active Patients All Patients ?			
Patient Patient Group Patient Flags Selected Flags Statement ID Calculate All Since last statement was printed All Include pt with zero bal or bal between from and to and to	2 Search		
Statement due date Due Date X Include note in statement I Compared a summary with balance for each provider I Include Line Items with zero bal 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.			

3. A Statement Note text box will appear that will allow you to enter your custom message. Once done, click on **Save**.

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	s with a patient balance but no insurance balance. I appointments whether the claim has a balance or not.
Please note: printing, mailing or previewing any statem	ck "Send statements to onpatient" in Account
Settings -> General.	Save
0 Patients Selected	1 - 29 OF 29
	Last Payment Amt Last Payment Posted # of Mailed Stmts # since Last Payment

Once the changes are saved, the notes will show on your patient statements.

Please note: The notes added are for one-time use, so if you would like them to carry over from month to month, they will need to be added just before running/printing patient statements.

This feature is implemented to avoid incorrect or outdated notes going out on a patient statement without your knowledge.

Here is a video that will walk you through including notes on your patient statements.