

How to Include Notes on your Patient Statements

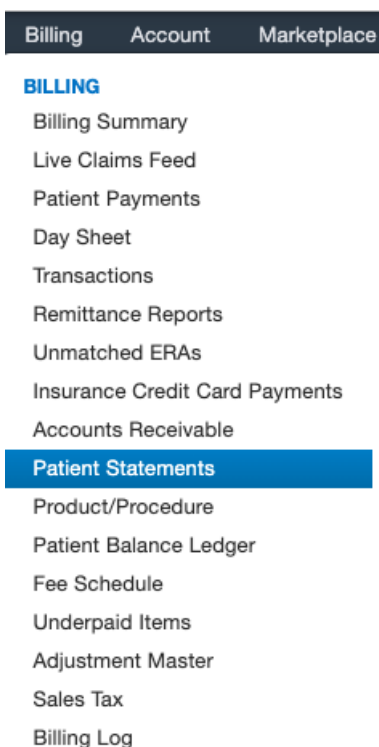
07/24/2024 4:50 pm EDT

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

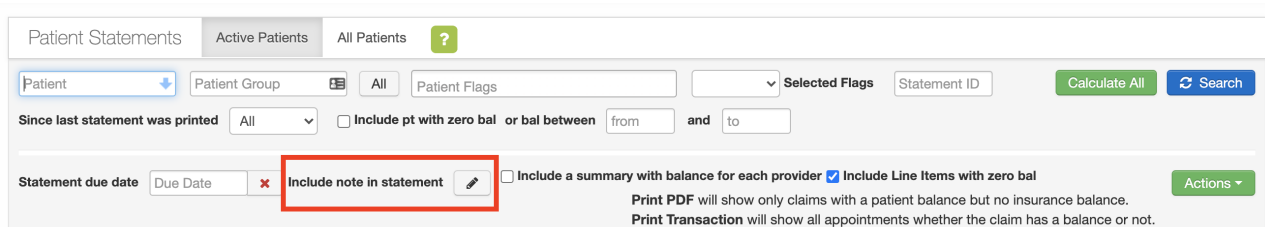
You can add messages such as "To set up a payment plan, please call xxx-xxx-xxxx", "Your Prompt Payment is Appreciated" or anything else you would like to send out on all of your patient statements.

Please follow the steps outlined below:

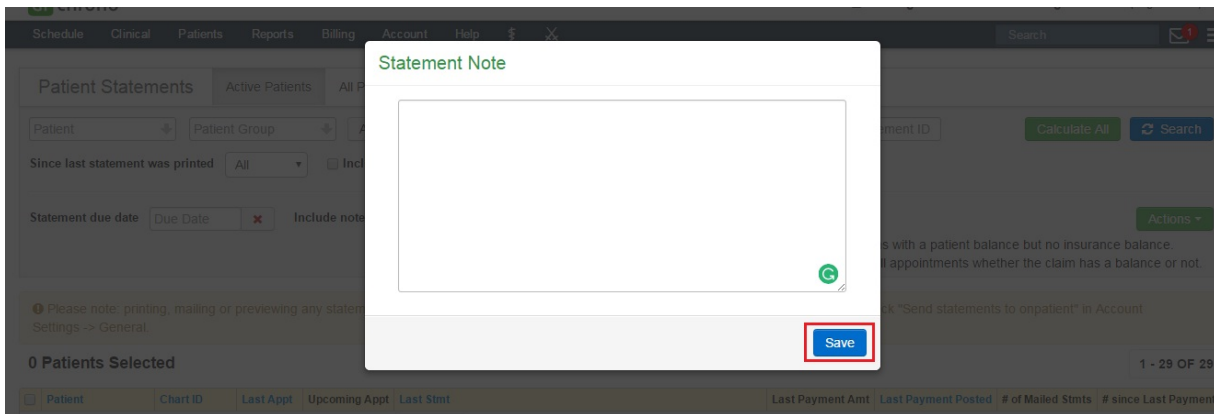
1. Hover the cursor on the **Billing** tab and select **Patient Statements**.



2. Click on the pencil icon just to the right of the option **Include note in statement**.



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



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This feature is implemented to avoid incorrect or outdated notes going out on a patient statement without your knowledge.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