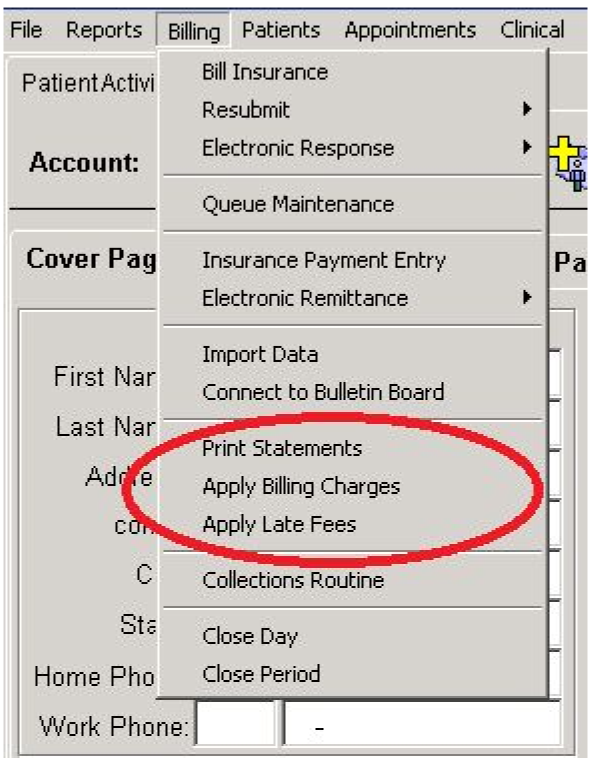
Running Billing Statements

1. Applying Late Fees and Billing Charges.
2. Printing Statements
3. Adding Messages to Statements
4. Viewing an Individual Statement

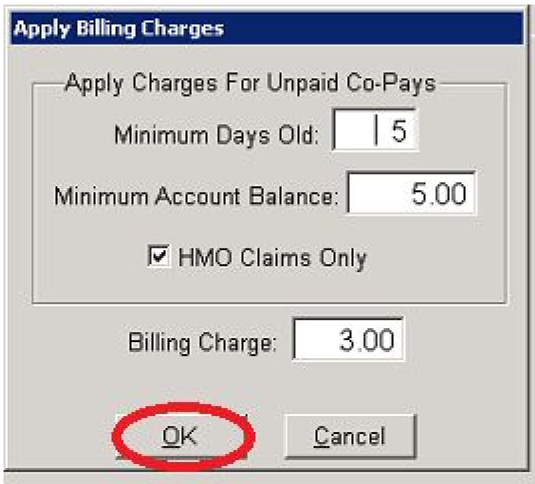
Applying Late Fees, applying Billing Charges and Printing Statements are all accessed from the **Billing** tab.



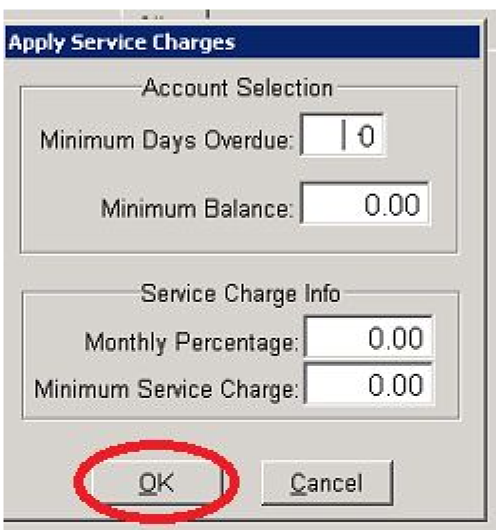
Follow established office policy regarding the application of both Billing Charges and Late Fees.

1. Choose **Apply Billing Charges**.

Adjust fields per your office policy. You may add a Billing charge if your policy states one will be added if copay is not collected at time of service.

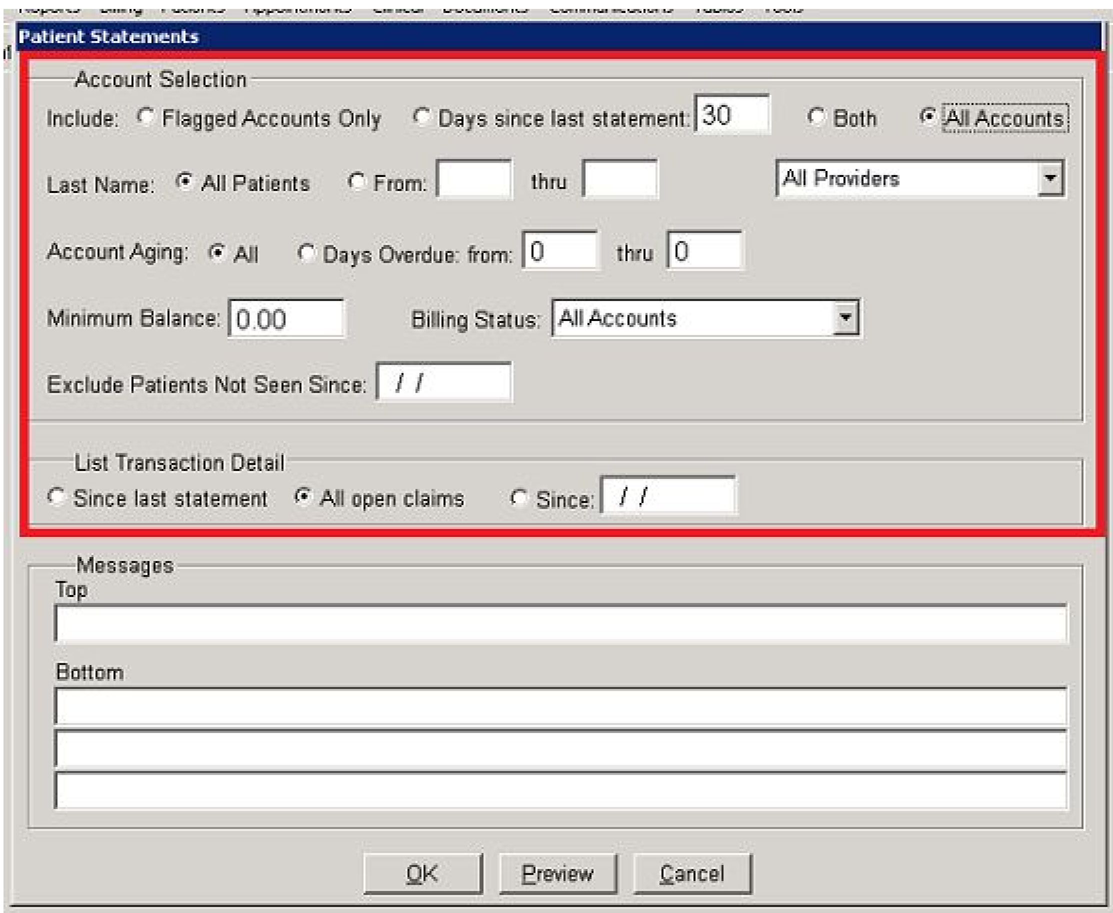


Choose **Apply Late Fees.** Adjust fields in Service Charges window according to office policy.



Clicking **OK** in either scenario brings up a window which shows you the number of accounts which receive the added charges/fees and the total dollar amount charged. **OK.**

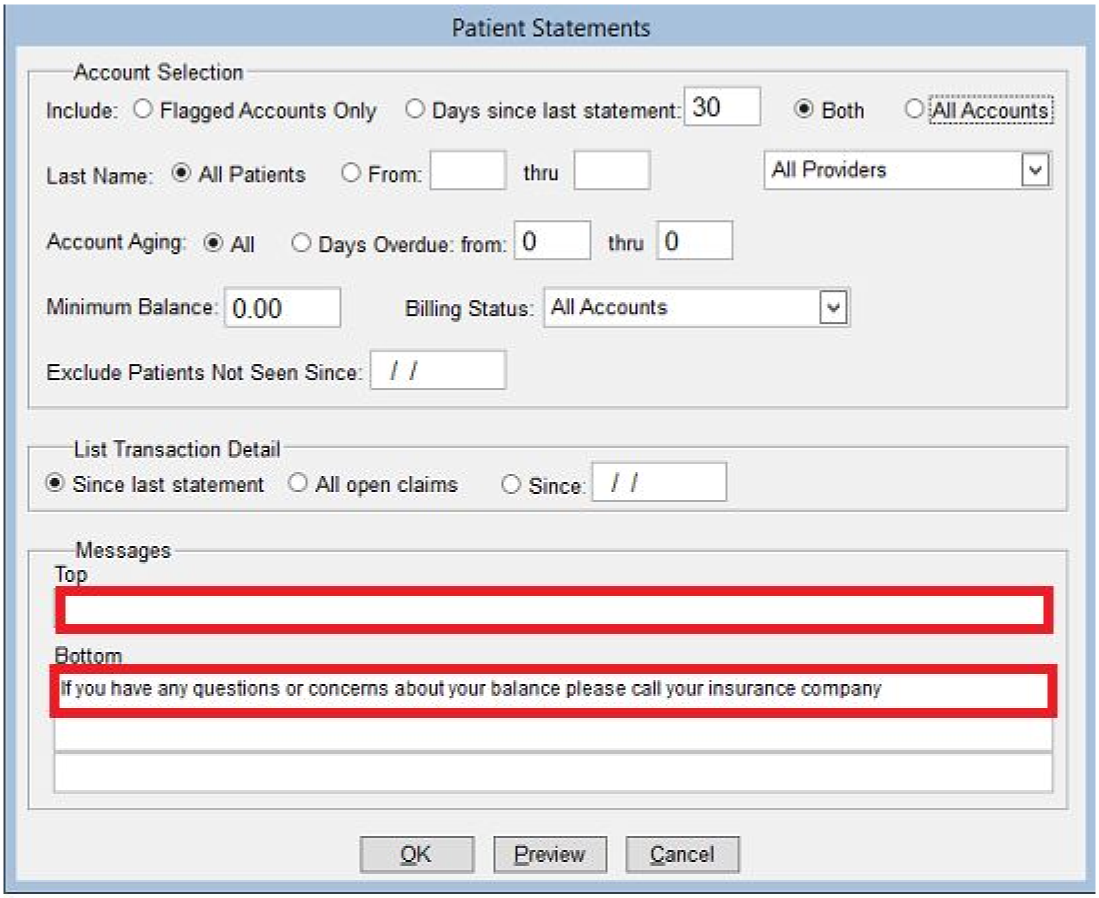
2. Choose **Print Statements** from **Billing** tab.
Fill in the top of the **Patient Statements** window per office policy.
Determine who you want to receive statements as well as how many will go out at one time.
Larger practices may choose to break up a run alphabetically by last name; (A-K) one week and (L-Z) the next.
Many practices require a minimum balance of $5 before sending a statement.



3.You may enter seasonal reminders or office updates in the **Top** box of the **Messages** section. Examples: "Don't forget your Flu Shot" or "Remember to schedule school physicals now."

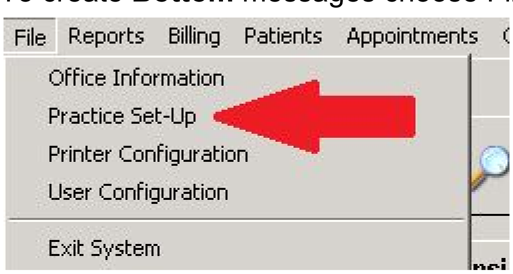
Top messages will only appear for the current statement run.

Bottom messages are created in Practice Set-up and appear every statement run.

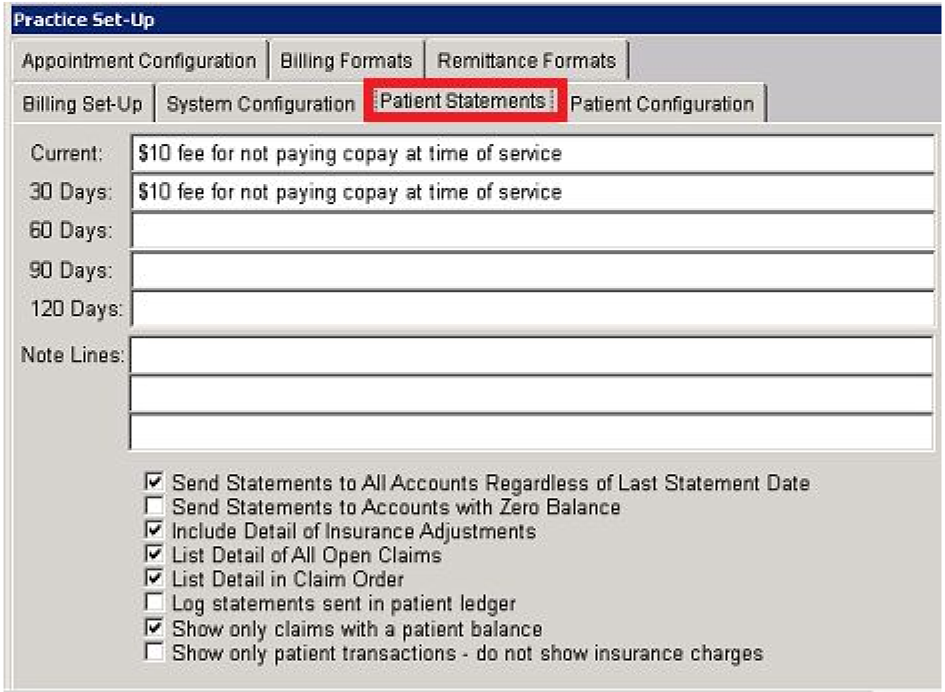


Once statement set-up is complete, click **OK** to run statements. Clicking **Preview** will give you a report to check to see if your pending run is correct.

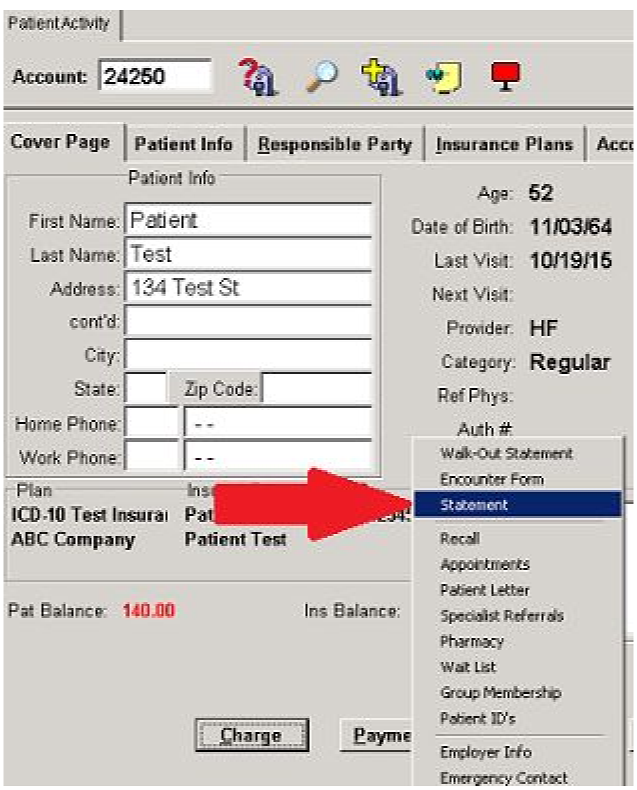
To create **Bottom** messages choose File tab, **Practice Set-up**.



Choose Patient Statements tab. Type in message and choose statement parameters according to office policy.



4. To view or print an **Individual Statement**, bring up patient in **Patient Activity** screen. If Statement button at the bottom is not available, right click anywhere in the gray area.
From the Drop Down menu, choose **Statement**.



Leave the Period fields blank. **OK**

From **Print Options** window, you may Print or View the statement.

**Please note that only the latest statement will be available. This why you are able to leave the dates blank. No back statements are available.