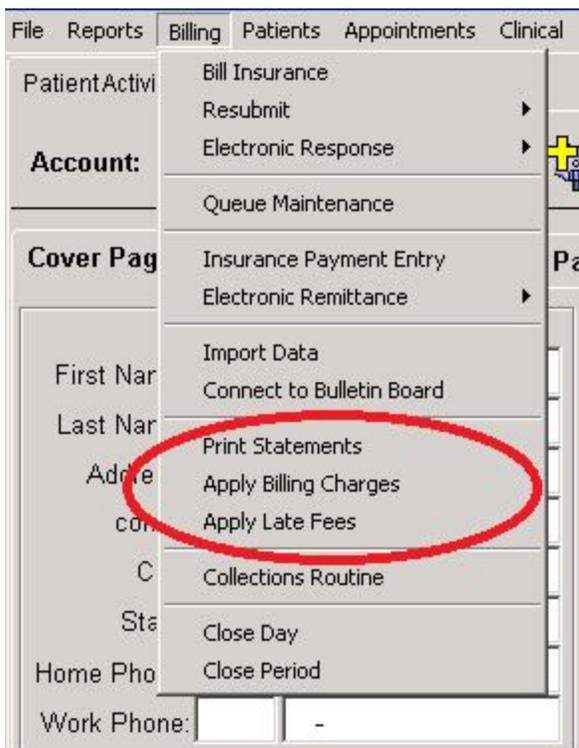


Running Billing Statements

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.

Apply Billing Charges

Apply Charges For Unpaid Co-Pays

Minimum Days Old:

Minimum Account Balance:

HMO Claims Only

Billing Charge:

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

Apply Service Charges

Account Selection

Minimum Days Overdue:

Minimum Balance:

Service Charge Info

Monthly Percentage:

Minimum Service Charge:

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**.



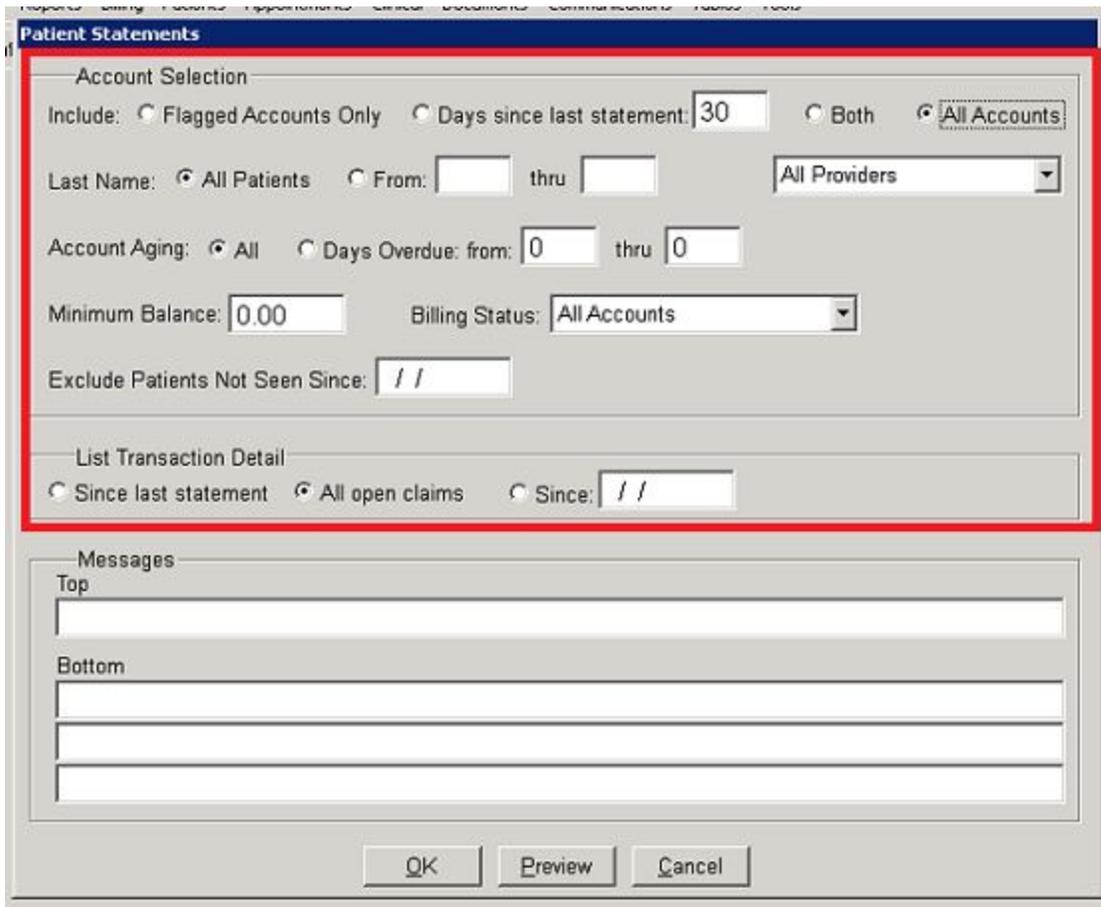
2. Choose **Print Statements** from **Billing** tab.

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.

The screenshot shows the 'Patient Statements' dialog box. It is divided into several sections: 'Account Selection', 'List Transaction Detail', and 'Messages'. In the 'Account Selection' section, 'Both' is selected under 'Include', and '30' is entered for 'Days since last statement'. 'All Patients' is selected for 'Last Name', and 'All Providers' is selected in the dropdown. 'All' is selected for 'Account Aging', and '0' is entered for 'Days Overdue'. '0.00' is entered for 'Minimum Balance', and 'All Accounts' is selected in the 'Billing Status' dropdown. '//' is entered for 'Exclude Patients Not Seen Since'. In the 'List Transaction Detail' section, 'Since last statement' is selected. In the 'Messages' section, the 'Bottom' message box contains the text 'if you have any questions or concerns about your balance please call your insurance company'. The 'Top' message box is empty. At the bottom of the dialog are 'OK', 'Preview', and 'Cancel' buttons.

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.

Practice Set-Up

Appointment Configuration | Billing Formats | Remittance Formats

Billing Set-Up | System Configuration | **Patient Statements** | Patient Configuration

Current: \$10 fee for not paying copay at time of service

30 Days: \$10 fee for not paying copay at time of service

60 Days:

90 Days:

120 Days:

Note Lines:

- Send Statements to All Accounts Regardless of Last Statement Date
- Send Statements to Accounts with Zero Balance
- Include Detail of Insurance Adjustments
- List Detail of All Open Claims
- List Detail in Claim Order
- Log statements sent in patient ledger
- Show only claims with a patient balance
- Show only patient transactions - do not show insurance charges

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**.

Patient Activity

Account: 24250

Cover Page | Patient Info | Responsible Party | Insurance Plans | Accounts

Patient Info

First Name: Patient

Last Name: Test

Address: 134 Test St

cont'd:

City:

State: Zip Code:

Home Phone: --

Work Phone: --

Age: 52

Date of Birth: 11/03/64

Last Visit: 10/19/15

Next Visit:

Provider: HF

Category: Regular

Ref Phys:

Auth #

Walk-Out Statement

Encounter Form

Statement

Recall

Appointments

Patient Letter

Specialist Referrals

Pharmacy

Wait List

Group Membership

Patient ID's

Employer Info

Emergency Contact

Plan: ICD-10 Test Insurance ABC Company

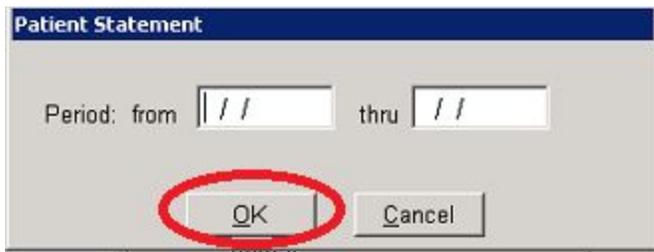
Ins: Patient Test

Pat Balance: 140.00

Ins Balance:

Charge Payme

Leave the Period fields blank. **OK**



The image shows a dialog box titled "Patient Statement". It contains a label "Period: from" followed by a date input field containing " / /". To the right of this field is the word "thru" followed by another date input field containing " / /". Below these fields are two buttons: "OK" and "Cancel". The "OK" button is circled in red.

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.