

Print Statements for Patients on the Schedule

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Path: Clinical, Practice Management, or Billing tab > Schedule button > Tracking radio button

Overview

In an effort to collect previous patient balances at the time a patient is seen, practices may choose to print statements according to who is on the schedule for a specific day. Family statements for any patient on the Schedule whose guarantor has a patient balance for anyone in the financial family will be printed. The filters for Account/Claim options do not apply to the selection of which statements to print. This includes accounts with a status of:

- On Hold
- Uncollectable Claims
- Older Than
- All Sent

Print Statements from the Schedule

1. Navigate to the Tracking view of the Schedule by following the path above.
2. Use the **Date** drop-down located in the upper left-hand corner of the window to select the schedule date if different than the current date.
3. Click the **Statements** button. The statements will generate a print preview or print directly depending on what settings you have for your workstation.
4. Close the window when complete. This will take you back to your **Tracking** screen.