Office Practicum

Batch Billing Statements

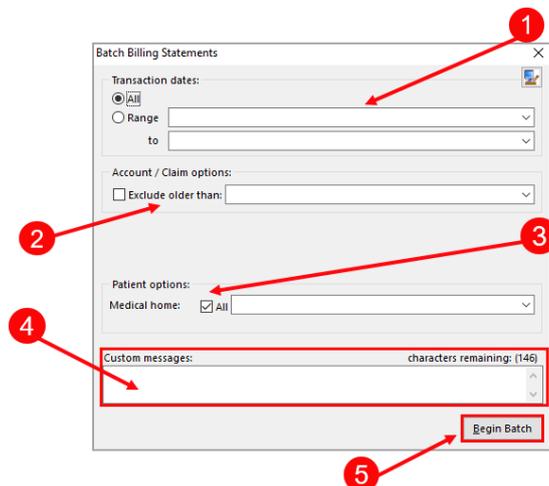Last Modified on 08/10/2021 12:38 pm EDT

Version 20.3

> This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

About Batch Billing Statements

Path: Billing tab > Billing Center button > Statements Queue tab > Bulk Statements button

When an office is ready to send patient statements in bulk, they will access the Batch Billing Statements window. Here, the user creating the statement batch will select statement parameters in the Batch Billing Statements window. Majority of the settings that dictate Batch Billing Statements are set in the **Billing > Statements tab** in **Global/System Preferences**.

Batch Billing Statements Map

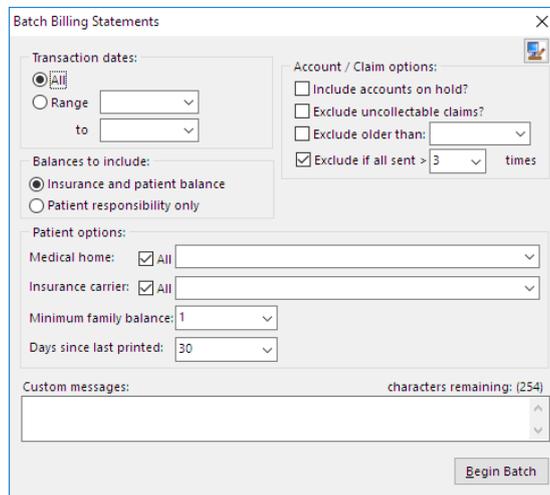| Number	Section	Description
1	Transaction Dates	The dates for which statements will be included in the statement batch. The user can select the option to include all dates or only a specific date range.
2	Account / Claim Options	If the **Exclude older than** setting in the Global Statement Preferences is zero, this option is disabled. If a setting (in days) higher than zero is made in Global Statement Preferences, this field is enabled and used for excluding claims with a specific date from the statement file. If changed, the selection made here overrides the setting in Global/System Preferences but does not change the Global setting itself.
3	Patient Options	This field allows the user to include all patients in the statement file or only patients with a specific Medical Home, as indicated in their patient chart.
4	Custom Message	A custom message may be entered here to override the dunning message(s) entered in Global/System Preferences.
5	Begin Batch button	The **Begin Batch** button initiates the process of batching family statements that meet the Statement criteria entered in this window and set in the Global/System Statement Preferences.

Version 20.2

About Batch Billing Statements

Path: Billing tab > Billing Center button > Statements Queue tab > Bulk Statements button

When an office is ready to send patient statements in bulk, they will access the Batch Billing Statements window. In the Batch Billing Statements, you can set your statement parameters before printing the statements in bulk. Click the **Begin Batch** button to begin printing the statements.

User Permission: When Batch Billing Statements are displayed, they are listed by the patient last name. However, when setting the statement parameters, you select to send the statements by the last name of the guarantor. The guarantor last name may be different than the last name of the patient. Therefore, you will see patient last names that are outside of the selected guarantor last name alphabetical range.