Generate a Statement from the Patient Chart

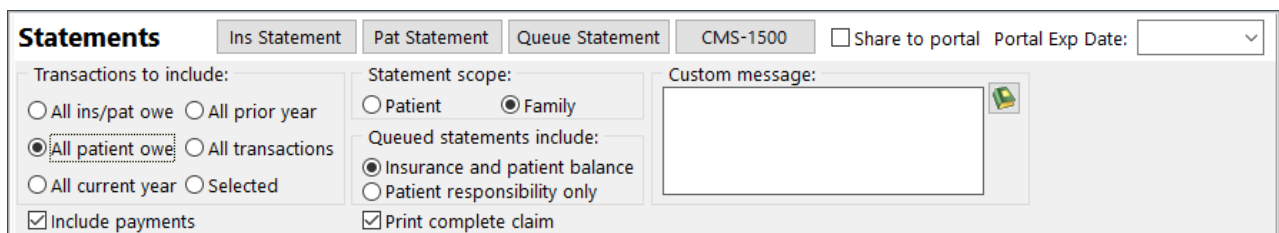Last Modified on 06/30/2020 10:40 am EDT

Version 20.4

> **Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Statements**

Overview

A patient or insurance statement can be printed at any time from the patient chart. Patient statements can also be sent to the Statement Queue or to the patient's OP Patient Portal account from the patient chart. Statements can only be sent to the InteliChart Patient Portal by practice staff who have an associated user account on the InteliChart Practice Portal.

Select Transactions to Include

1. Navigate to the Statements section of the patient chart using the path above.
2. In the **Transactions to Include** section of the window, select the appropriate radio buttons depending on what transactions should be included on the statement.

> 💡 **Tip:** If choosing to select specific transactions, use the**Shift** button on your keyboard to select a group of transactions. If the transactions you want to include are not in order, use the **Ctrl** button on your keyboard to select the transactions to include.

3. Proceed with the appropriate section below for printing or sending the statement.

Create the Statement

Print the Statement

1. Select the transactions you want to Include by following the steps above.
2. Click the **Pat Statement** button. The statement for all selected transactions will either print directly to the printer or launch a Print Preview window depending of the setting on your workstation.

Send the Patient Statement to the Statement Queue

1. Select the transactions you want to include by following the steps above.
2. Click the **Queue Statement** button. The statement is automatically sent to the Statement Queue located in the Billing Center.

Send the Statement to the Portal

1. Select the transactions you want to include by following the steps above.
2. Select the **Share to Portal** checkbox.
3. If needed, edit the **Portal Exp Date** for the statement.

☑ Share to portal Portal Exp Date: 7/15/2020 ⌄

4. Click the **Pat Statement** button.
5. In the Print or Print Preview window, select the **Print to File** checkbox.
6. Ensure that **PDF File** is the selected Type, and edit the Where selection, if necessary.
7. Click the **OK** button. The statement is sent as a PDF to the patient's portal account. When the portal user clicks the Billing Statement link in the Documents section of My Chart, the statement auto-downloads as a PDF file which can then be opened by the user. If the portal user attempts to view the document after the expiration date that has been selected, they will receive a message informing them to contact the practice.

Version 20.3

Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Statements

Overview

A patient or insurance statement can be printed at any time from the patient chart. Patient statements can also be sent to the Statement Queue from the patient chart.

Print a Patient Statement

1. Navigate to the Statements section of the patient chart using the path above.
2. Select the transactions that you want to print on the statement:

   - In the Transactions to Include section of the window, select the appropriate radio buttons depending on what transactions should be included on the statement.

Statements | Ins Statement | Pat Statement | Queue Statement | CMS-1500 | ☐ Save to portal
Transactions to include:
○ All ins/pat owe ○ All prior year
○ All patient owe ○ All transactions
○ All current year ● Selected
☑ Include payments

Statement scope:
○ Patient ● Family
Queued statements include:
● Insurance and patient balance
○ Patient responsibility only
☑ Print complete claim

Custom message:

   - If choosing to select specific transactions, use the **Shift** button on your keyboard to select a group of transactions. If the transactions you want to include are not in order, use the **Ctrl** button on your keyboard to select the transactions to include.

3. Click the **Pat Statement** button. The statement for all selected transactions will either print directly to the printer or launch a Print Preview window depending of the setting on your workstation.