

### Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

# Print or Send Statement Files from the Statement Queue

Last Modified on 11/08/2019 1:43 pm EST

Version 14.19

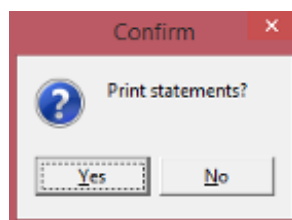
**Path: Billing tab > Billing Center button > Statements tab**


## Overview

Statements that are in the Statement Queue can easily be printed in-house or sent to your clearinghouse for printing. To maintain a healthy patient A/R, it is recommended to send patient statements on a regular basis.

## Print Statements In-house

1. Click the **Stmnts** button.
2. Click the **Yes** or **No** button in the confirmation pop-up box. Another pop-up box is displayed that shows the progress of the statements that are preparing to generate, followed by a Print Preview window.



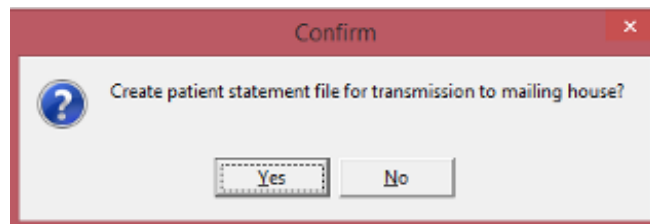
3. Click the **Print** button  to start printing statements.
4. Once printing is complete, click the **Yes** button in the Confirmation pop-up box. This logs in the patient's chart that a statement was generated for the patient. If No is selected, there is no log made that a statement was generated.



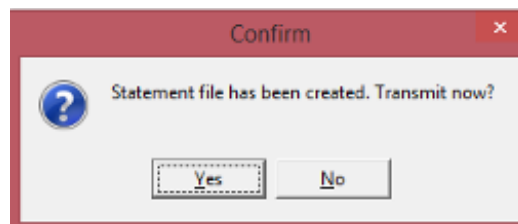
## Send Statement Files to Clearinghouse

When the user is in the statement Queue, they will see all Statements generated to be sent on an electronic statement file. To generate a file:

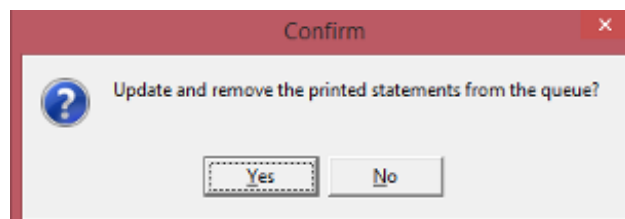
1. Click the **Create Files** button to create a .CSV output file of statements to send to a clearinghouse or mailing house with whom you have contracted to print and mail your statements for you.
2. Click the **Yes** button in the confirmation pop-up box to confirm that you are ready to create a patient statement file for transmission to the mailing house. A pop-up box is displayed that will show you the progress of the Statements that are preparing to generate.



3. If you are using a selected integrated Clearinghouse to do statement printing, click the **Yes** button in the confirmation pop-up box to confirm you want to transmit the statements.



4. Once the transmission of the statement file is complete, click the **Yes** button in the confirmation pop-up box. This logs in the patient's chart that a statement was generated for the patient. If No is selected, there is no log made that a statement was generated.



**Note:** If using a non-integrated clearinghouse or other print vendor:

- While Office Practicum will ask you if you want to transmit the file and the user selects

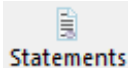


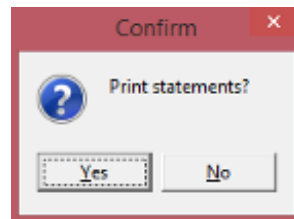
**Yes**, the file is not transmitted. Once the file is generated it will be placed in the **Admin Documents**, located in the **Admin** tab.

- This file will need to be exported to the users computer, preferably the Desktop, as it will be easier to find when uploading to your non integrated print vendor.
- After creating your file, you will need to go to your clearinghouse's website and manually upload the file from the area the file was saved, i.e. preferably your desktop this file should be saved too. You should then move this file to an archived 'Statement' folder on the server to maintain files previously sent.

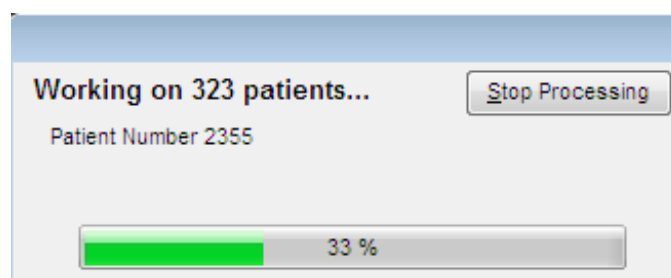
Version 14.10

**When the user is in the statement Queue, the user will see all statements generated to be printed in-house. To Print Statements:***(if sending an Electronic Statement file, skip to Step 2):*

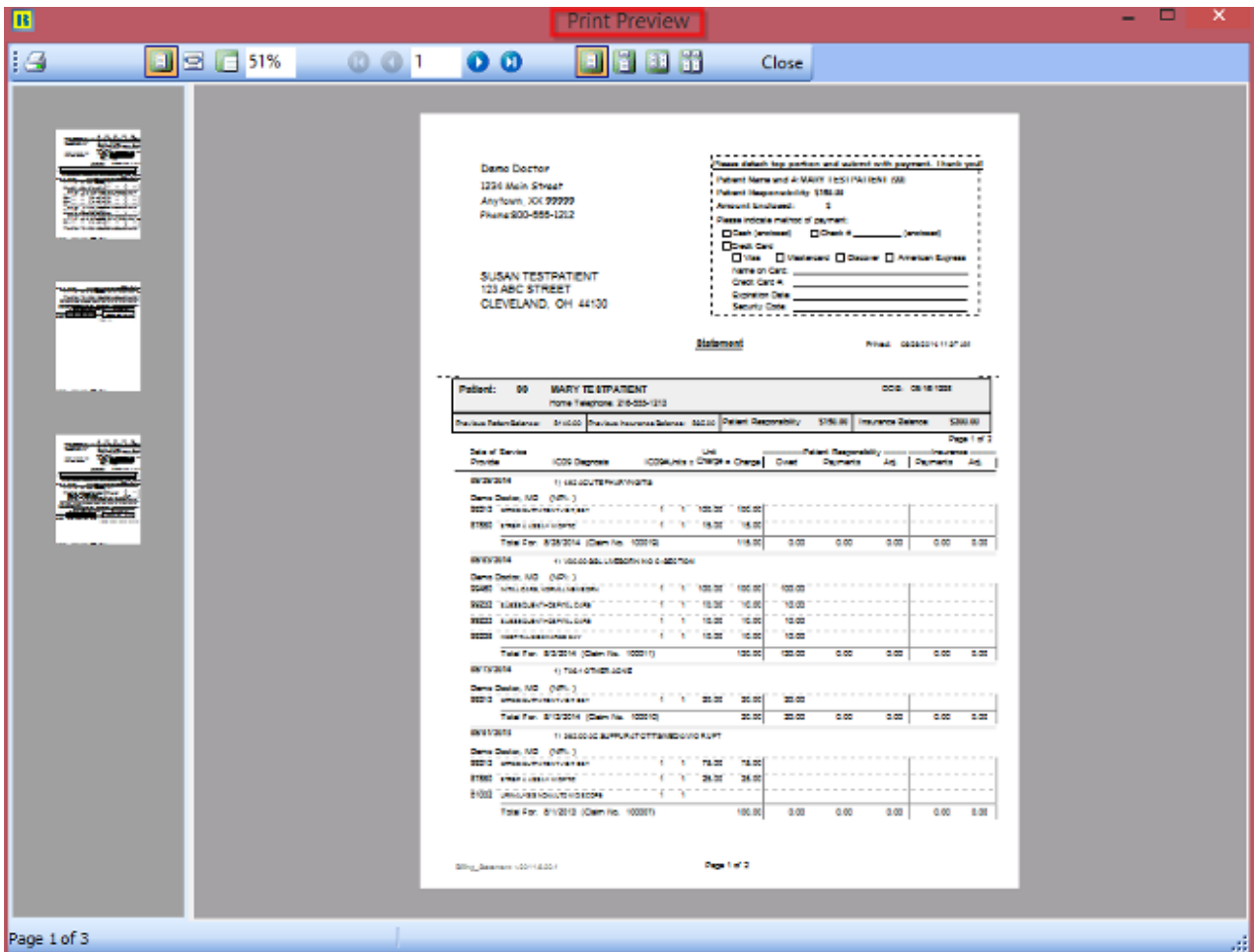
1. Click on **Statements**  button.
2. Office Practicum will ask user to confirm, Print Statements? Select **Yes**, if ready.




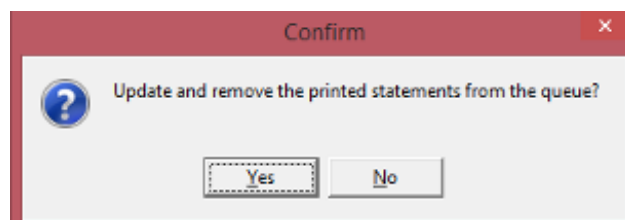
3. Office Practicum will show the process that statements are preparing to generate.



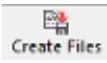
4. A print image of all statements will generate on the screen.



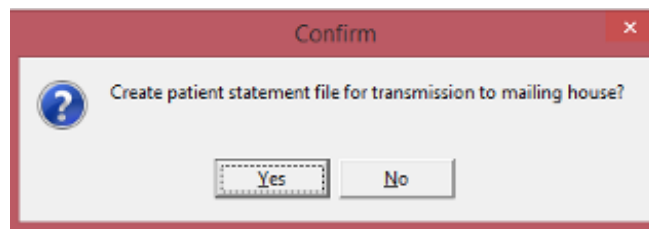
5. Click on **Print**  icon to start printing statements in house.
6. Once printing is complete, Office Practicum will prompt the user with a question, do you wish to update and remove statements from the queue. Select **Yes**. This is very important to indicate yes, because selecting yes will log in the patient's account that a statement was generated today for the patient. If no is selected, then no log will be recorded that a statement was generated today.



When the user is in the statement Queue, the user will see all statements generated to be sent on an electronic statement file. To generate a file:

1. Click on **Create Files**  button to create a .CSV output file of statements to send to a clearinghouse or mailing house with whom you have contracted to print and mail your statements for you.
2. Office Practicum will ask user to confirm, Create Statement file for transmission to the

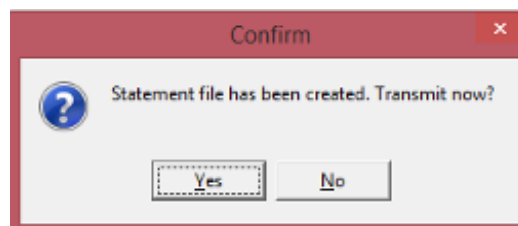
mailing house? Select Yes, if ready.



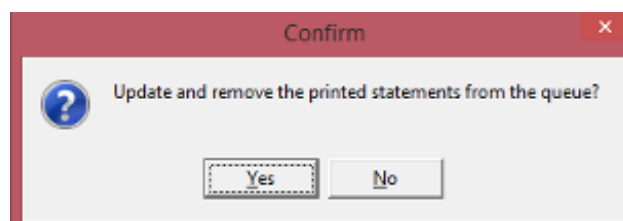
- Office Practicum will show the process that statements are preparing to generate on an electronic claim file.



- If user is using a selected integrated Clearinghouse to do statement printing, OP will prompt user: Statement file has been created do you wish to transmit now? Select **Yes**, if ready to send file.



- Once the statement file creation is complete, Office Practicum will prompt the user a question, if they wish to update and remove statements from the queue. Select **Yes**. This is very important to indicate yes, because selecting yes will log in the patient's account that a statement was generated today for the patient. If no is selected, then no log will be recorded that a statement was generated today.



#### Non Integrated Clearinghouse Print Vendor

- While Office Practicum will ask you if you want to transmit the file, & the user selects **Yes**, the file is not transmitted. Once the file is generated it will be placed in the *Administrative Documents*, under the **Activates** menu option.
- This file will need to be exported to the users computer, preferably the Desktop, as it will be easier to find when uploading to your non integrated print vendor.



- After creating your file, you will need to go to your clearinghouse's website and manually upload the file from the area the file was saved, i.e. preferably your desktop this file should be saved too. You should then move this file to an archived 'Statement' folder on the server to maintain files previously sent.

After the statement queue has been cleared and statements have been printed or created on an electronic statement file, you have the opportunity to identify accounts where statements are placed 'on hold' for situations when you do not want to generate a statement (e.g., payment on file, bad address, etc.). This is done by changing the preferred billing method in the Insurance Window of the Patient Account to "Hold (don't send)" or Credit Card on file, if using Instamed Merchant Services.

Best practices to maintain a healthy Patient AR, is to send Patient statements on a regular interval on a monthly basis through your Office Practicum.

Click for the next section: [Identifying When \(or If\) a Statement was Printed or Sent for an Outstanding Balance.](#)