

Patient Chart: Statements

Last Modified on 09/14/2021 10:24 am EDT

Version 20.4



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.

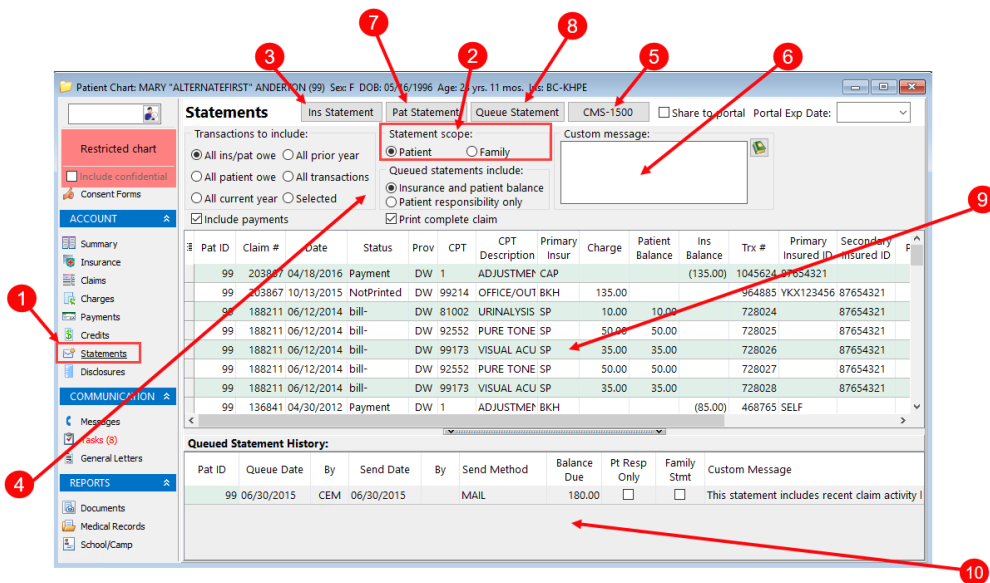
About Patient Chart: Statements Tab

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

The Statements window displays a list of all prior queued statements. This enables you to determine how long it has been since your last contact with the patient.



Note: Just like a paper chart, the electronic chart in OP contains personal health information and should be kept protected and confidential. Always close all windows on your screen and log out of OP when you are not at your workstation.



Patient Chart: Statements Map

Number	Section	Description
1	Statements button	The Statements button accesses the Statements section of the patient's chart.
2	Scope	The Scope field narrows the parameters for the displayed information in the patient's chart. Information can be displayed by patient or family.
3	Insurance Statement (Ins Statement) button	The Insurance Statement button prints the insurance statement with the insurance and patient responsibility for all selected charges and payments. The Insurance statement will match the Patient statement when the insurance company hasn't paid their portion of the selected charges.

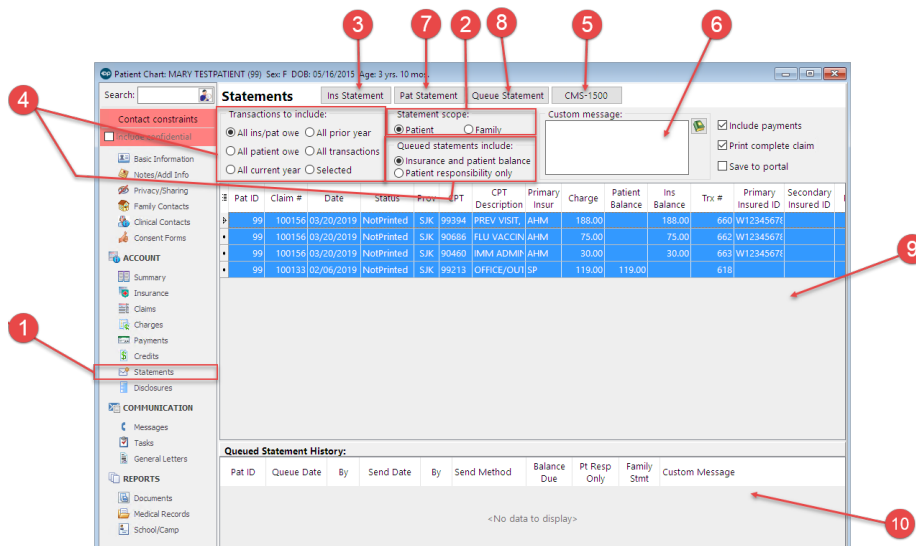
4	Display Criteria	The Display Criteria selections help to isolate different groups of transactions. The criteria is determined by transactions, statement scope, and balance or responsibility.
5	CMS-1500 button	The CMS-1500 button prints paper claims for HCFA-based insurance payers for all selected transactions. CMS-1500 forms should be in the printer when using this function.
6	Custom Message	The Custom Message field allows you to add a message prior to printing a statement. The Phrase Construction button can be used to help create the message..
7	Patient Statement (Pat Statement) button	The Patient (Statement) button prints a statement with the patient's responsibility for the selected charges. The Insurance statement will match the Patient statement when the insurance company hasn't paid their portion of the selected charges.
8	Queue Statement button	The Queue Statement button queues the patient statements for selected charges and payments.
9	Transaction List	The Transaction List displays the claims for the patient.
10	Queued Statement History grid	The Queued Statement History is a detailed history of all prior queued statements. This makes it easier to determine how long it has been since your last contact with the patient.

Version 20.3

About Patient Chart: Statements Tab

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

The Statements window displays a transaction list of all prior queued statements. This enables you to determine how long it has been since your last contact with the patient.



The screenshot shows the 'Statements' window for a patient named MARY TESTPATIENT. The window is divided into several sections:

- 1:** The 'Statements' button in the left-hand navigation pane.
- 2:** The 'Queue Statement' button at the top of the window.
- 3:** The 'Ins Statement' button at the top of the window.
- 4:** The 'Display Criteria' section, which includes radio buttons for 'All ins/pat owe', 'All prior year', 'All patient owe', 'All transactions', 'All current year', and 'Selected'.
- 5:** The 'Statement scope' section, with radio buttons for 'Patient' and 'Family'.
- 6:** The 'Custom message' field.
- 7:** The 'Pat Statement' button at the top of the window.
- 8:** The 'Queue Statement' button at the top of the window.
- 9:** The transaction list table, which contains columns for Pat ID, Claim #, Date, Status, Prov, PT, CPT, Description, Primary Insur, Charge, Patient Balance, Ins Balance, Trx #, Primary Insured ID, and Secondary Insured ID.
- 10:** The 'Queued Statement History' grid at the bottom of the window, which has columns for Pat ID, Queue Date, By, Send Date, Send Method, Balance Due, Pt Resp Only, Family Stmt, and Custom Message.

Patient Chart: Statements Map

Number	Section	Description
1	Statements button	The Statements button displays a patient's statement information in the Patient Chart.

2	Scope	The Scope field narrows the parameters for the displayed information in the patient's account. Information can be displayed by patient or family.
3	Insurance Statement (Ins Statement) button	The Insurance Statement button prints the insurance statement with the insurance and patient responsibility for all selected charges and payments. The Insurance statement will match the Patient statement when the insurance company hasn't paid their portion of the selected charges.
4	Display Criteria	The Display Criteria selections help to isolate different groups of transactions. The Criteria is determined by transactions, statement scope, and balance or responsibility.
5	CMS-1500 button	The CMS-1500 button prints paper claims for HCFA-based insurance payers for all selected transactions. CMS-1500 forms should be in the printer when using this function.
6	Custom Message	The Custom Message field allows you to add a message prior to printing a statement. The Phrase Construction button can be used to help create the message..
7	Patient Statement (Pat Statement) button	The Patient (Statement) button prints a statement with the patient responsibility for the selected charges. The Insurance statement will match the Patient statement when the insurance company hasn't paid their portion of the selected charges.
8	Queue Statement button	The Queue Statement button queues patient statement for selected charges and payments.
9	Transaction List	The Transaction List displays the claims for the patient.
10	Queued Statement History grid	The Queued Statement is a detailed history of all prior queued statements. This makes it easier to determine how long it has been since your last contact with the patient.