# Patient Chart: Disclosures

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Version 14.19

> 🎯 *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: Disclosures

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

The Disclosures window in a patient's chart displays the statements and claims that were generated and transmitted out of OP for the specific patient. All patient statements that were sent are listed as Patient in the Recipient column and include the date of when the statement was sent and the staff member who sent it. Claims are displayed with 837 Processor or Insurer in the Recipient column and also include the date and staff member as well as the claim batch number.

> 📌 **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.
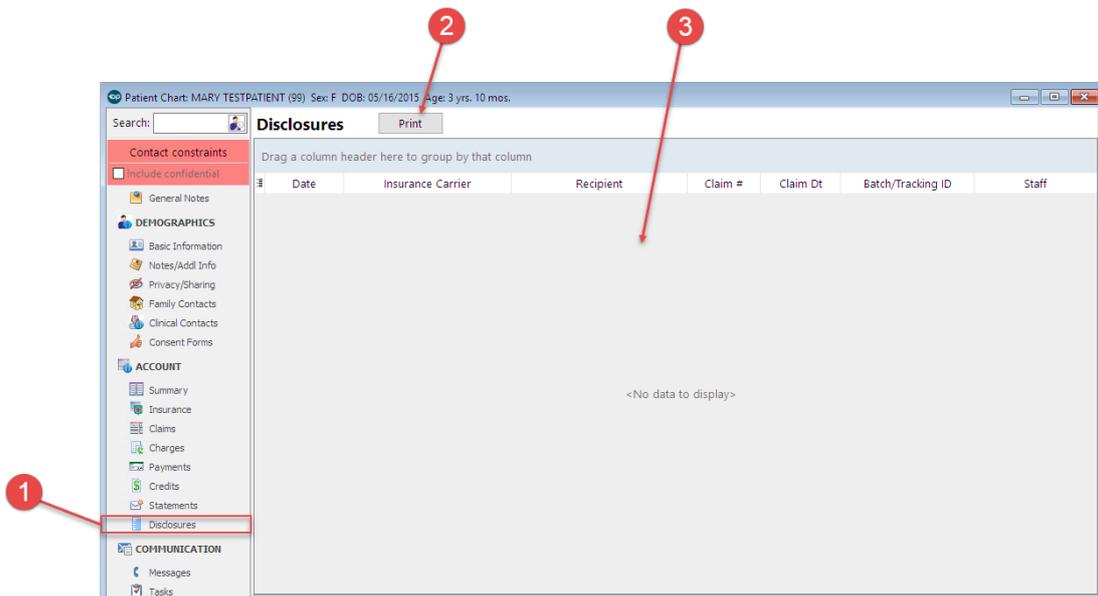


## Patient Chart: Disclosures Tab Map

| Number | Section | Description |
|---|---|---|
| 1 | Disclosures button | The Disclosures button accesses the Disclosures window in the Patient Chart. |
| 2 | Print button | The **Print** button prints the patient's Disclosure grid. |
| 3 | Disclosures Grid | The Disclosures grid displays the information for the patient statement(s) and claim(s) that were sent. |

# About Patient Account: Disclosures Tab

**Path: Smart Toolbar > Account button > Disclosures tab**

The Patient Account window maintains a patient's account.  Some of the main functions that can be performed on a patient's account include:

- Enter a copay
- Post a charge manually
- Enter hospital charges
- Verify claim accuracy
- Post a patient payment
- Issue a patient refund
- Write an account note
- View claim history
- Print a CMS-1500
- Print a statement

The Disclosures tab displays the patient statements that were sent.  All patient statements that were sent will be listed as Patient in the Recipient column. You can also see the date of when the statement was sent and the person who sent it.
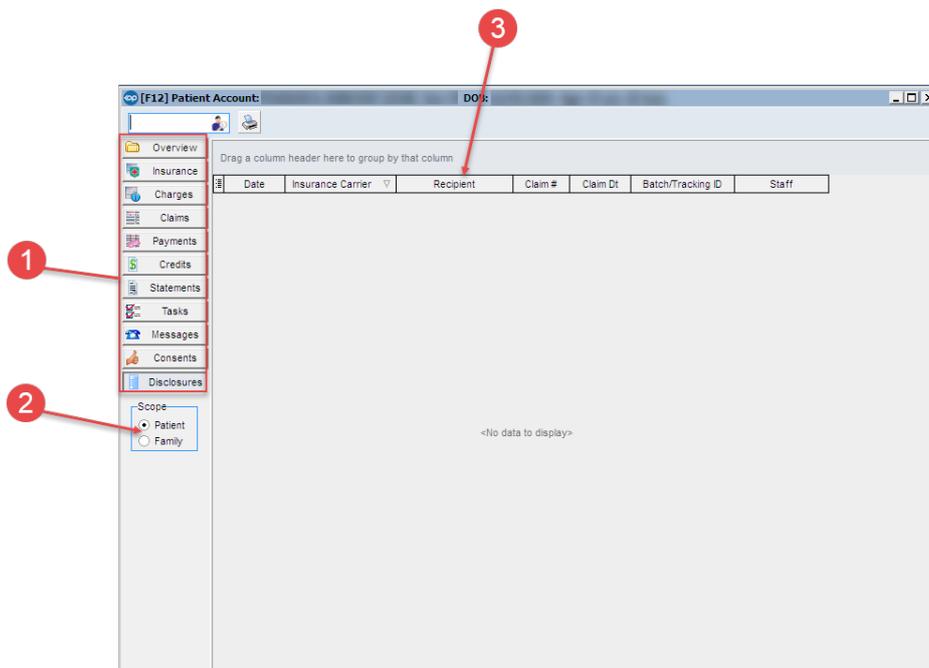


## Patient Account: Disclosures Tab Map

| Number | Section | Description |
|---|---|---|
| 1 | Patient Account | The Patient Account contains the following tabs:<br>- **Overview**<br>- **Insurance**<br>- **Charges**<br>- **Claims**<br>- **Payments** |

| | tabs | <ul><li>**Credits**</li><li>**Statements**</li><li>**Tasks**</li><li>**Messages**</li><li>**Consents**</li><li>**Disclosures**</li></ul> |
|---|---|---|
| 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 | Disclosures Grid | The Disclosures grid displays the patient statements that were sent. All patient statements that were sent will be listed as Patient in the Recipient column. You can also see the date of when the statement was sent and the person who sent it. |