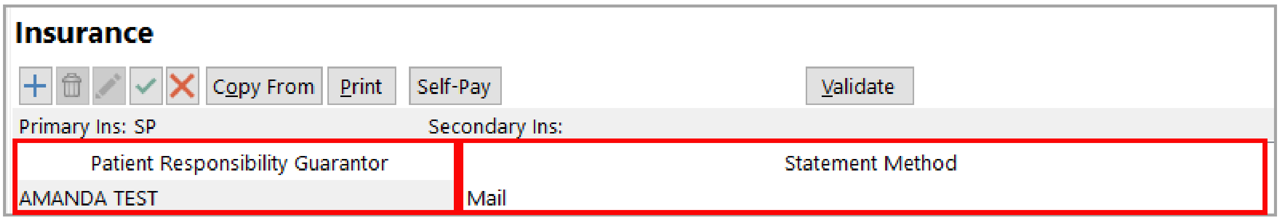
Statement Method Options

Last Modified on 12/28/2023 11:24 am EST

Version 14.19

About

The Statement Method, selected in the patient's Insurance record, is what determines how the patient will receive their statements. In order for the Patient Statement selection to be complete, there must also be a selection made in the Guarantor field. Guarantors must first be entered in the **Family Contacts** section of the Patient Chart so that they are displayed in the Patient Responsibility Guarantor drop-down.



Select Patient Statement Method

1. Navigate to the Insurance record in the Patient Chart:**Clinical, Practice Management, or Billing tab > Patient Chart button > Insurance**.
2. Use the drop-down in the **Patient Responsibility Guarantor** field to select the individual responsible for satisfying patient balances.
3. Use the drop-down in the **Statement Method** field to select from the following options:

   - **Mail**: When statement files are generated, the patient's balance will be included so that the statement can be sent by mail.
   - **Credit card on file**: Balances on the patient's account will be paid using the credit card that has been saved on file.
   - **Hold (don't send)**: Statements for the patient will be excluded from statement files until another method has been selected. This is only valid if the Include accounts on hold checkbox is deselected in the **Statement settings in Global Preferences**. This method should be used when working with Test Patients so as not to create a statement for a fake patient.

Version 14.10

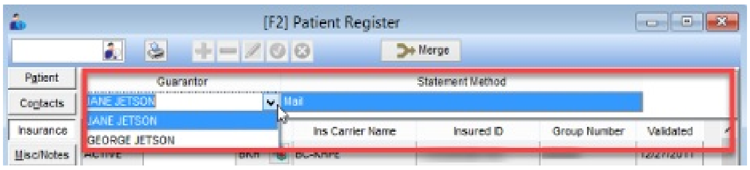
⚠ **Note**: In order for the guarantor's name to appear in this dropdown, he or she must first be added as a Contact in the patient's Register. Follow the instructions to enter the guarantor as a contact by clicking **here**.

When registering a patient in OP 14, you will want to be sure you select the person financially responsible for satisfying the patient's balances. Additionally, you will need to select how the statement should be received. To do this:

1. Click **Insur** on the Smart Toolbar. The Patient Register will appear with the Insurance tab selected.

   - You can also navigate to the insurance tab of the patient's Register or Account.

2. If the patient record has not been accessed at this time, locate and select the patient.
3. In the **Guarantor** field, select the guarantor who should receive patient balance statements.



4. Select the appropriate Statement Method from the **Statement Method** dropdown. Selections include:

- **Mail**: A statement will be sent via USPS mail when a statement file is generated.
- **Notify via Portal**: A message will be sent to the patient portal notifying the guarantor that a statement balance is due.
- **Credit card on file**: Balances on the patient's account will be paid using the credit card that has been saved on file.
- **Hold (don't send)**: Statements will not be sent until another method has been selected.