Office Practicum

View Previously Sent Statements/Statement Files

Last Modified on 07/26/2023 1:55 pm EDT

Version 21.1

About

Statement files that have been sent out of OP can be viewed from the Statement Queue and from the Administrative Documents Repository. However, if you need to see statements sent for individual patients, that is best accomplished from the Patient Chart. Click **here** for steps on viewing this information.

View Previously Sent Statements from the Statement Queue

1. Navigate to the Statements tab in the Billing Center: **Billing tab > Billing Center button > Statements tab**
2. Select the date range you would like to search, or leave as the default selection **All**.
3. Deselect the **Unsent only** checkbox. All statements previously sent from the queue are displayed.
4. You will see the following for each statement. You can click the column header to sort in ascending/descending order by that column.
   - Patient Name
   - Queue Date
   - Queue By
   - Send Date
   - Send By
   - Send Method
   - Balance Due
   - Pt Resp Only
   - Family Stmt
   - Custom Message

Tip: You can add or remove column headers and their information by clicking the Show/Hide/Move columns button to the left of the column headers, and selecting or deselecting as appropriate. Other column headers that you can add and sort by include **ID** and **Insurance**.

View Previously Sent Statement Files from Administrative Documents

1. Navigate to the Repository of Practice Administration Documents window: **Admin tab > Admin Documents**.
2. In the Transaction Type box, select **STMT**.
3. Enter a Begin date and End date or leave the date fields blank to search all files.
4. Select the checkbox to **Include reviewed records**.
5. Click **Search**. All of the statement files sent electronically are displayed.

Version 21.0

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