How can I make sure patients are included in my batch statements?

Last Modified on 07/21/2023 10:45 am EDT

> **Path: Billing Tab > Billing Center button > Statements Tab > Bulk Stmts button**

Here are a few of the batch statement parameters you can check to ensure that your patients are included in your statement batches.

- When batching your statements, ensure that **Exclude if all sent >= XX times** is deselected or the number in the field is high enough to not effect the batching.
- Make sure the Minimum family balance is set appropriately.

> ☆ **Example**: If the minimum family balance is set to $20, and the family's balance is only $10, then that family will be excluded from the statement batch.
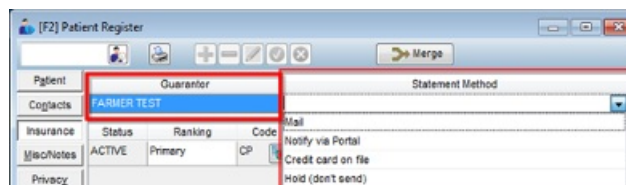
- Make sure the Days since last printed is set appropriately.

> ☆ **Example**: If all patients should receive a statement regardless of when a previous statement was sent, enter -1.

Additionally, you will want to ensure that all patients have a Guarantor and Statement Method selected at the top of the Insurance tab in their Account or Register. To do this:

1. Navigate to the Patient Register: (**Path: Smart Toolbar > Register button**).
2. Select the Insurance tab.
3. Make sure that all patients have a Guarantor and Statement Method selected.

For more information on creating batch statements, click **here**.