Help Articles How do I generate my monthly statements?



How do I generate my monthly statements?

Click the word "Reports" and choose the "Statements" option from the dropdown box.

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th Patient or Responsi	ole Party	Management Reports								PGID:3158 / OII	
ch For	Search	Insurance Reports							Sear	rch In	
Patient Responsible Part		Appointments Reports Treatment Plan Reports Referral Reports Recall Reports	Medic Chart SSN Email	caid ID t #	0000	Birth Date Home Phone Cell Phone Work Phone	0000	Patient ID Responsible Party ID Responsible Party Type Subscriber ID	•	Current Office All Offices Search in Office Group Include Inactive Patients	
	Enter	Ortho Reports	-				Sean	ch Last Search	Ad	d New Patient	
		Statements									
		Lists	•								
		Group Reports Office Reports	•								
		Letters Batch Collection Letters Postcards Labels Custom									
		My Reports Excel Reports									
		Blank Insurance Forms Pat Reg./Medical Info Forms									
		Dashboard									

If your office has indicated finance charge parameters in Setup/Office/Setup tab in which your patients will be charged for carrying an outstanding balance on their Ledger, click the Finance Charge button.

Scheduler Pätient - Transactions - Char	ting - Reports - Report New - Utilities -	Setup • Office CH Johnson Dental Health Ge Help • My Ad	count Logout			
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Statement			PGID :3035 / OID :100 📥			
	11-22		Finance Charges			
Statement Date	4/8/2020		A			
Responsible Party Range		Last Statement Date	2/27/2019 Print Last Statement Sent			
Start Name	AAAAA Search	Last Close Out Date	3/27/2019			
End Name	ZZZZZ Search	Exclude accounts where statement was sent	t within last 💿 🔻 days.			
Account Balance Over 5.00		Exclude accounts where patient portion is patient	Exclude accounts where patient portion is paid and insurance portion is expected			
		Exclude patients Sent to Collection.				
Include Credit Balances	Sort by Resp.Party Lastname		No Tune Defined			
Suppress Aging	Sort by Resp.Party ID	Evaluate Deservatible Darks Turse				
Hide Insurance Shares		Exclude Responsible Party Type	Cash			
Hide Credit Card Section						
Maximum 100 characters per message						
General Message		Current Message				
We value your smile and appreciate your prompt pay	ments.	We value your smile and appreciate your pron	npt payment.			
Remaining Characters: 43		Remaining Characters: 45				
Over 30 Message		Over 60 Message				
Please pay balance to eliminate finance charges. That	nk You!	Please pay balance to eliminate finance charge	es. Thank You!			
Remaining Characters: 41		Remaining Characters: 41				
Over 90 Message		Over 120 Message				
Account processing at collections agency and/or law e	enforcement.	Account processing at collections agency and/	for law enforcement.			
Remaining Characters: 36		Remaining Characters: 36				
Note: Please update Statement Dates after Printing ar	to Emailing respective Office Statements.					
Print Statement Report		Print Statements	Update Statement Dates			

Ensure the Finance Charge applications are indicated correctly and click Apply.

- Finance Charge Date
- Responsible Party Range
- Exclude Responsible Party Type
- Provider
- Apply Finance Charge to
 - Patient Portion
 - Entire Balance

Ensure the Statement parameters are correct and Click the 'Print Statement Report' button

Then click the 'Print Statements Button' to view the statements and to print the statement batch for postal mailing. Also, consider saving the generated statements PDF to your PC for future reference.

When the user is confident that the statements are correct for final posting to the patient ledger, click the Update Statement Dates button.

CAUTION: Updating the statements will post a "Statement Sent" line in the patient Ledger. When the line is placed in the Ledger, all data for that patient (equal or prior to the statement date) will be locked and can NOT be edited.

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				Finance Charges		
Statement Date	4/8/2020					
Responsible Party Range		Last Statement Date	2/27/2019 Print Last Statement Sent			
Start Name	AAAAA Search	Last Close Out Date	3/27/2019			
End Name	ZZZZZ Search	Exclude accounts where the second sec	ere statement was sent within last 0 🔻 days.			
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General Message		Current Message				
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Please pay balance to eliminate finance cl	harges. Thank You!	Please pay balance to e	liminate finance charges. Thank You!			
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