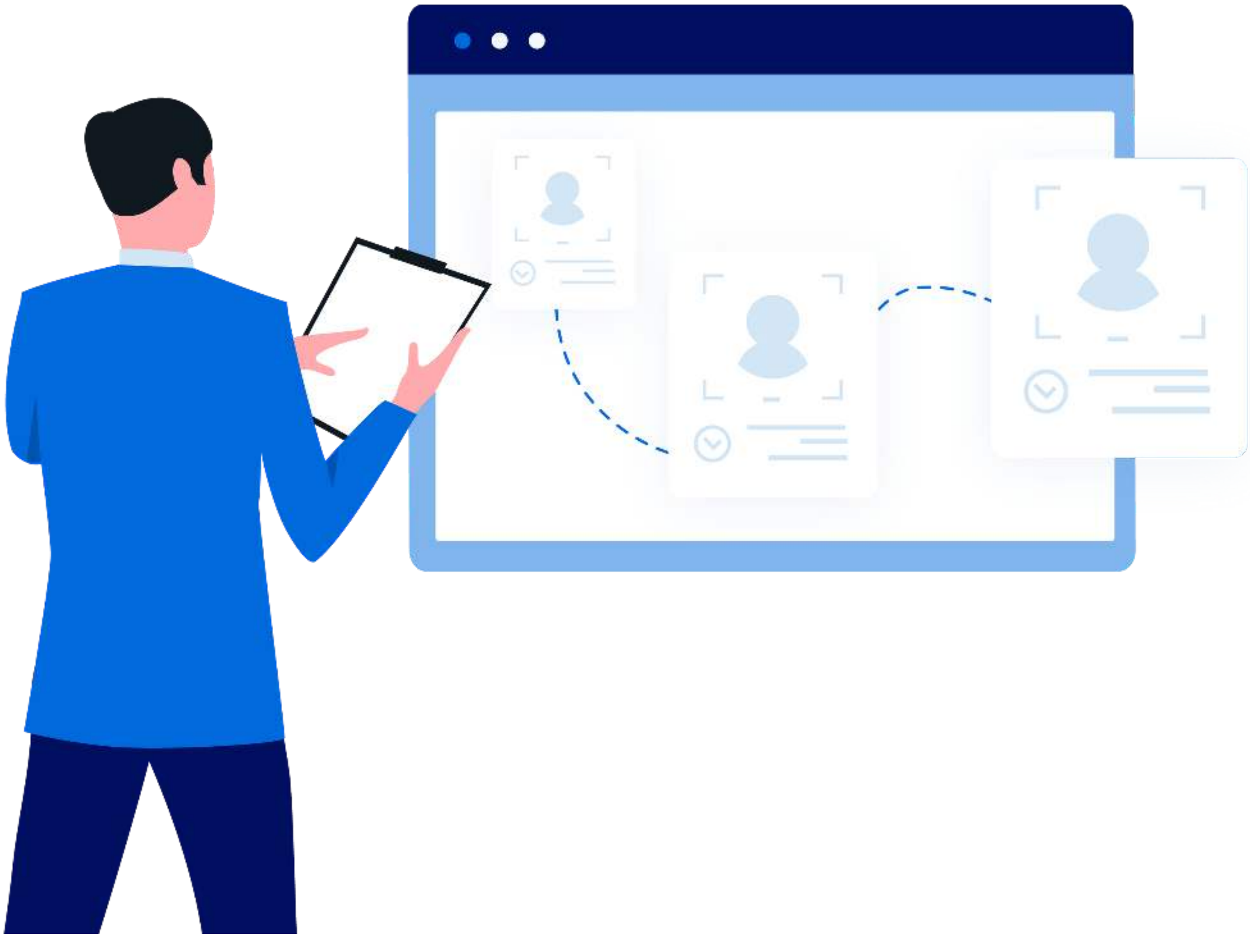
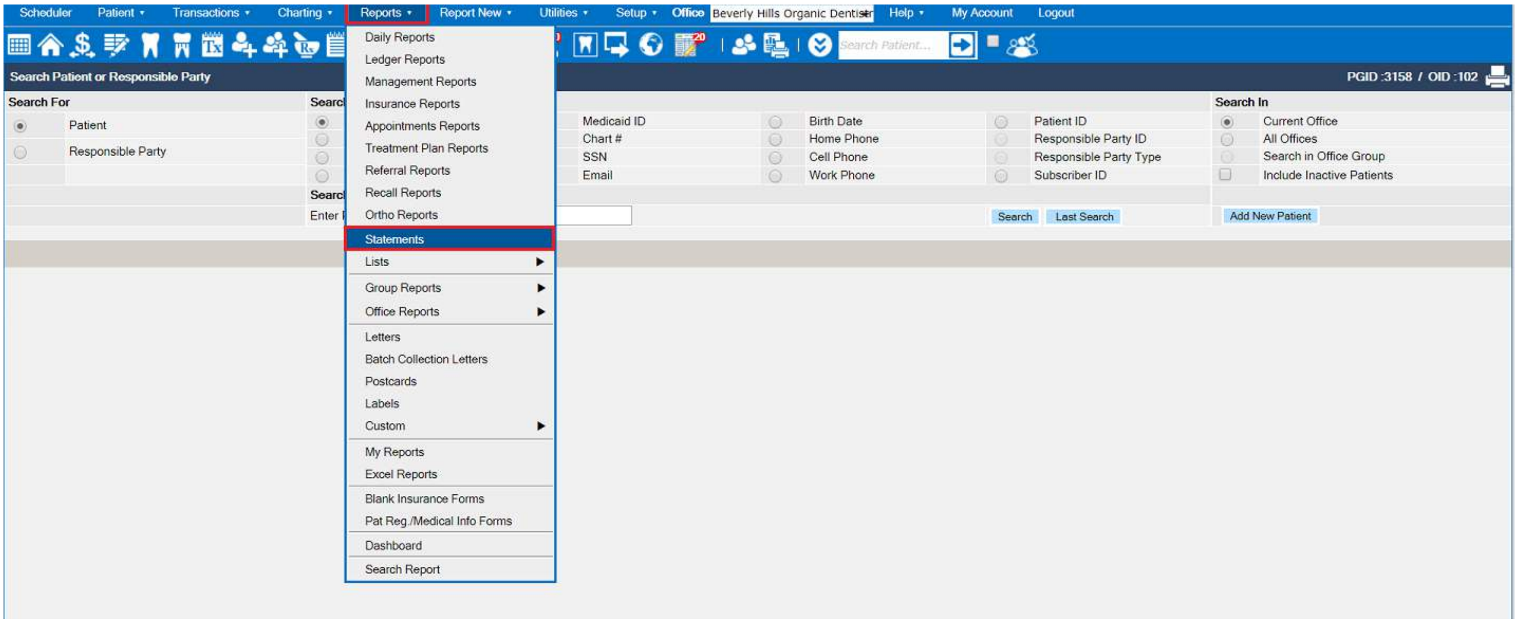
Help Articles

How do I generate my monthly statements?

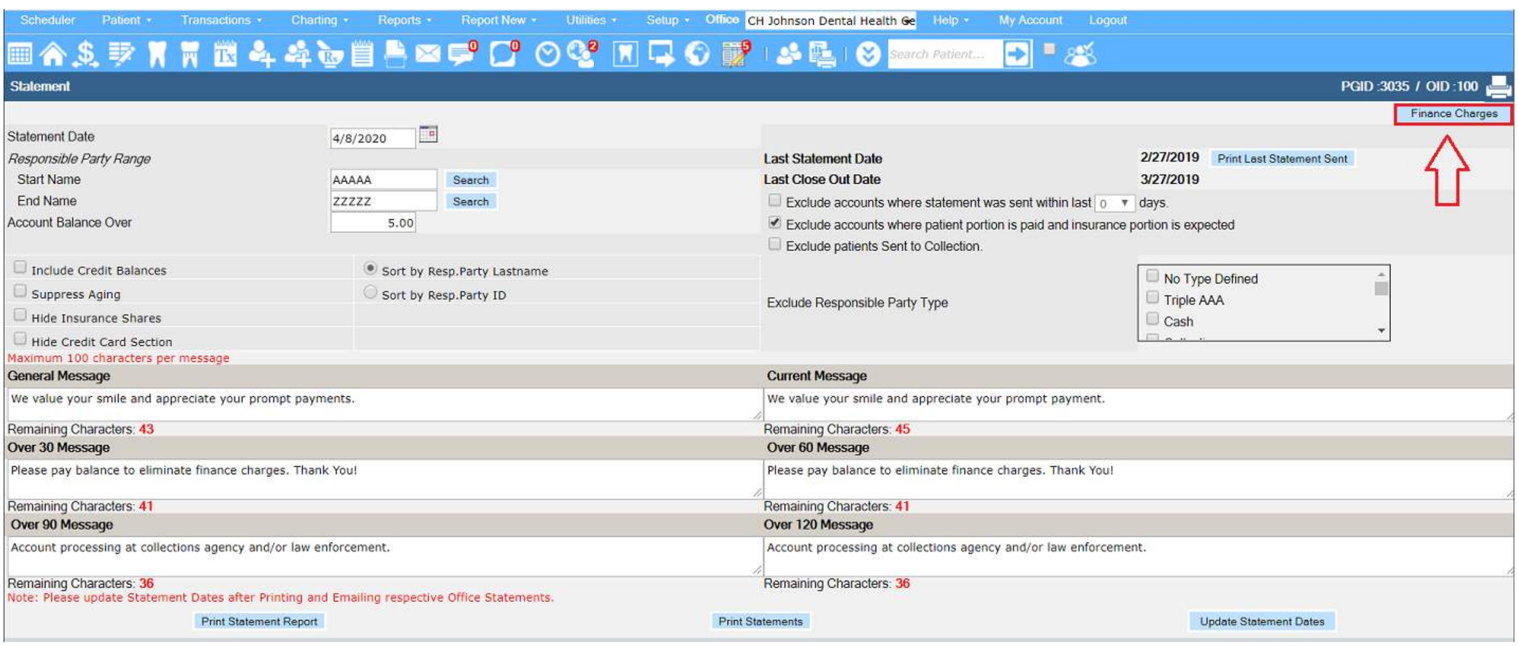


How do I generate my monthly statements?

Click the word “Reports” and choose the “Statements” option from the drop-down box.



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.



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.