



Patient Balance Forward Statements by Date or Claim Summary (Monthly or Individual)

Before you begin...

Setting your Path

Be sure your user path is set in your provider team account. **Provider/Team** menu, **Preferences** tab, **Path** tab, “Default Statement Path” field. Initially click “Desktop” for all of the fields (unless you have an office protocol already set up) so the files you create will land on your desktop. If there is another user creating invoices they will do the same. You can create folders such as "Statements Sent" on your desktop where you can move the files after sending them.

Also, on the **Preferences** menu, **Program Defaults** tab, **Age** tab, set the “Default Statement Delivery” field to “Direct.”

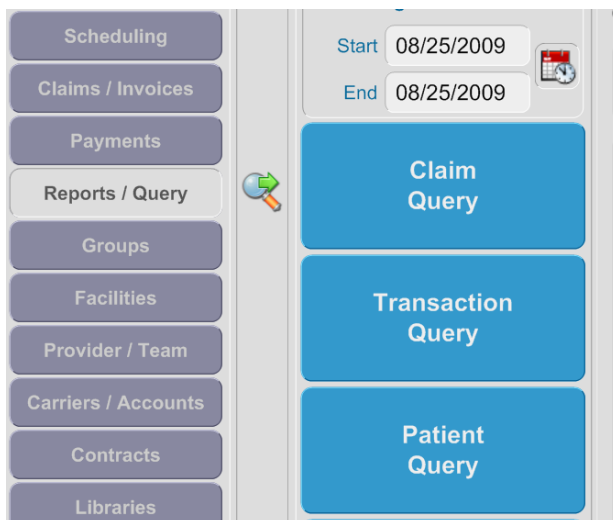
The screenshot shows the 'Program Defaults' tab in the software interface. The 'AGE' sub-tab is selected. The 'Default Statement Delivery' field is set to 'Direct' (radio button selected). Other visible fields include 'Default Past Due Range' (1: 30, 2: 60, 3: 90, 4: 120), 'Default Statement Trigger Balance' (\$ 3.00), and 'Default Grace Period (Days)' (0). A table of Transactions Code and Transactions Type is also visible.

Transactions Code	Transactions Type
AC	Adjustment on Claim
AI	Adjustment to Insuran
AP	Adjustment to Patient
HC	Held Charge
HT	Held Transaction
NC	None Claim Charge
OL	Outside Lab
PR	Patient Responsibility
PA	Payment Applied to P
PP	Payment by Patient
BP	Payment from Billing
PI	Payment from Ins. Co
PC	Payment on Claim

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Creating your monthly patient statements

1. Go to the **Reports/Query** menu. Select **Patient Query**.



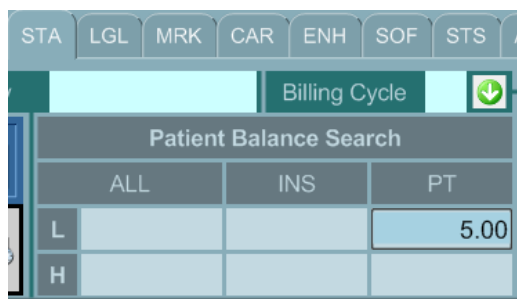
2. Select the **STA** tab.



3. Click the red minus to clear the query (on right of screen).



To perform a search on Patient Balance, in the “L” field enter “5.00”. Make sure your claims are correctly set to “P”, as the patient balance amount is what the patient is being asked to pay. If you would like to separate by billing cycle, go to the **STA** tab and enter a billing cycle. To choose a specific Group, go to the **MED** tab to separate by Rendering Provider.

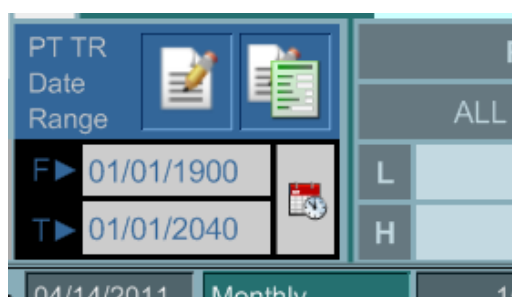


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- Click the blue down arrow icon on right to perform the search



- Change the dates in "PT TR Date Range" to the dates which you wish to show detail. All balances before the start date will appear as Prior Balance in the Statement.



- Click the "SH" square if it is yellow to clear the Statement Holders and update the previous patient balances before running new statements.



Select **Delete All** when prompted.



Patient Balance Forward Statements by Date or Claim Summary

- Click the Balance Forward Statement with Claim Summary icon (report with green paper). For Patient Statements in date order, click the Balance Forward Statement icon (no green paper).
- The **Statements** tab of the Process Builder will appear. Click the PDF Icon next to “Export” to create the PDF file to print.

The screenshot shows the 'Process Builder' interface. At the top, there's a search bar with 'Type Statement' and a date field set to '12/31/2011'. Below this are several tabs: 'Elec Claim Filing', 'Elec Claim Receiving', 'HL7', 'Statements' (which is highlighted), 'Superbill', 'CMS', 'Diag', 'Let / Hdr', and 'Cust. Form'. Under the 'Statements' tab, there are sub-tabs: 'PT', 'TR_DR', 'Ready Claims', 'CLM', 'TR', 'Claims to Transactions', 'Crnt TR', 'Prior TR', and 'Items'. A toolbar contains a magnifying glass, a left arrow, 'All', a red stop button, 'Type', 'Balance Forward', 'Export', a PDF icon, and radio buttons for 'CLM' (selected) and 'DATE'. Below the toolbar are columns for 'Billing Cycle', 'Financially Responsible', 'Billing Frequency', 'Min. Pmt', 'View Statement', 'PT Balance', and 'PT Un'. A table lists two patients: 'Jones, Martha' with a balance of 45.00 and 'Jones, Jonathan' with a balance of 339.00.

	Billing Cycle	Financially Responsible	Billing Frequency	Min. Pmt	View Statement	PT Balance	PT Un
		Jones, Martha		50.00		45.00	
		Jones, Jonathan				339.00	

The files will be on desktop, or in whatever path was specified in the “Default Statement Path” in the **Provider/Team** menu, **Preferences** tab.

Return to your desktop. You will see two files, i.e. A102_Multiple.pdf and A102_single.pdf, if you have both single page and multiple page statements. Print these files. Then move them to your Sent Statement folder.

The date the statement was sent to the patient will appear in their information page and on their Processing tab.

The screenshot shows a form with the following fields: 'Billing Cycle' with a value of '4', 'Billing Freq.' with a dropdown menu showing 'Monthly', 'Minimum Payment' with an empty input field, and 'Last Stmt.' with a date 'Wed, Apr 13, 2011' and a yellow 'D' icon.

Patient Balance Forward Statements by Date or Claim Summary

The screenshot displays a software interface with a top navigation bar containing the following tabs: Information, Insurance, Guarantor, Attorney, Employer, Referral, Appointments, Claim Ledger, Transaction Ledger, Processing, and Link. Below the navigation bar, there are several floating action buttons: 'View This Superbill' (red), 'View This Statement Batch' (orange), 'View This Patients Statement' (teal), 'View This Custom Form' (light grey), 'View This Letter' (dark grey), and 'Go to This Processing Event' (grey). A table is visible at the bottom of the interface, with the following data:

Date	Processing Type	Processing Status	Letter / Form Title
03/31/2011	Statement		