CHECK LIST

(some features may vary if using a previous version, please stay current)

Ready Claim Statements

☐ Select Ready Claim status for any claim that has a patient balance

☐ Preview all claims marked "Ready Claim" on the "Reports / Menu" > "Claim" tab > report "Status (Ready Claim)." Click "Preview" to then select the "Claim #" to bring up the claim for any updating. For example, if claim has a zero balance and has not been changed to status "Closed."

☐ On "Claims" > "Processing" tab under "Quick Process" click "Statement (rc)."

☐ Enter the "Billing Cycle" to create by billing cycles

☐ Click "Clear Patient from Event" red icon to remove a patient from getting a statement

☐ Click the "PDF" icon to create the patient statements

☐ Click the "Path" tab, then the "Single" and " Multi" tabs to bring up and print the statements

