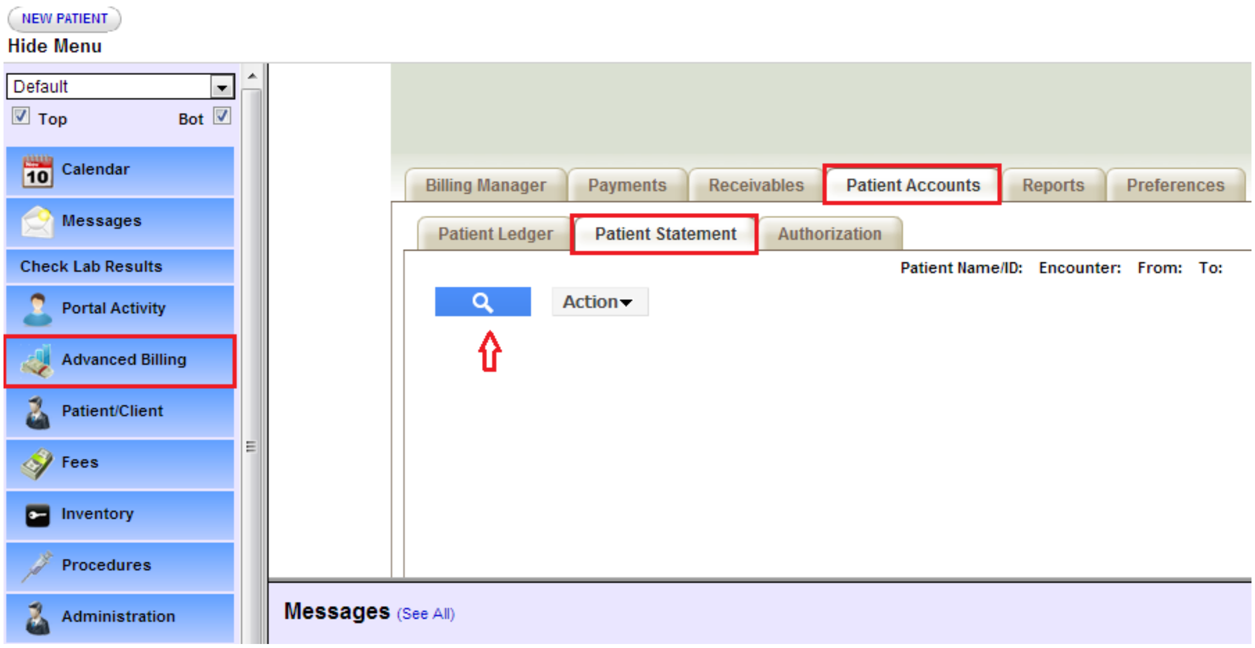
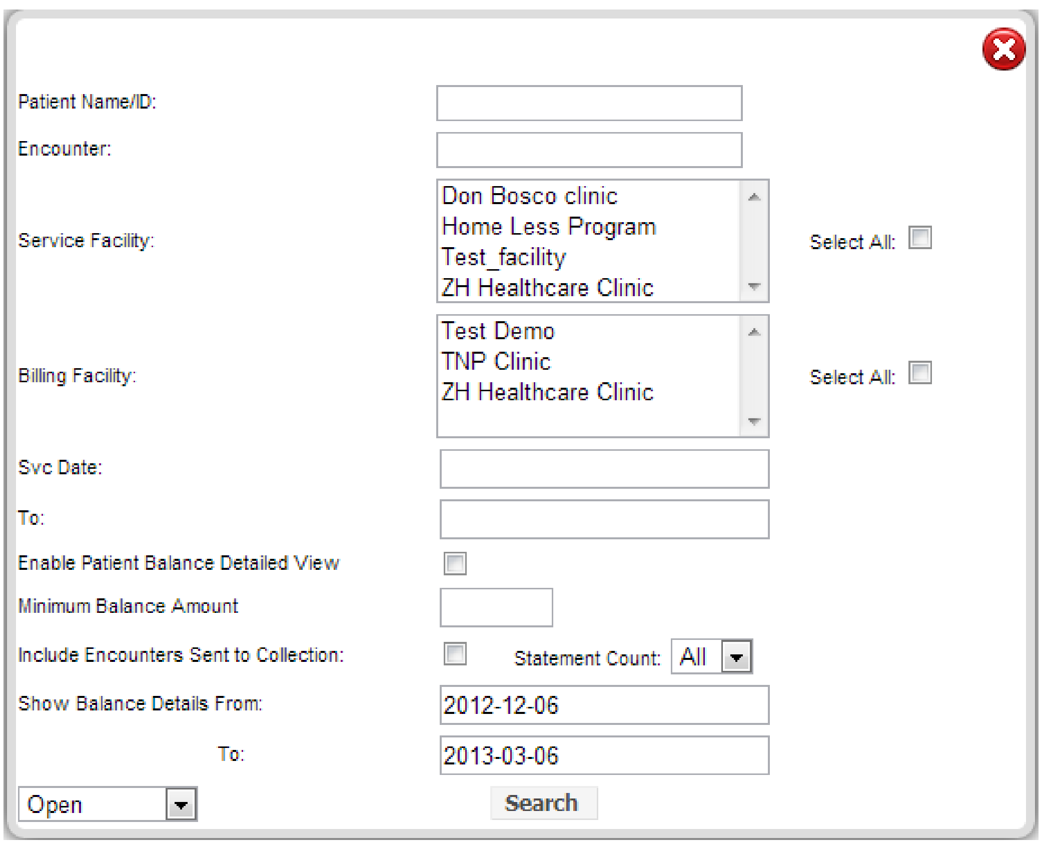
Create Patient Statements

Click on “Advanced Billing” in the left-hand pane. Advanced Billing screen will open. Click on “Patient Accounts” then click on “Patient Statement” and the search button.



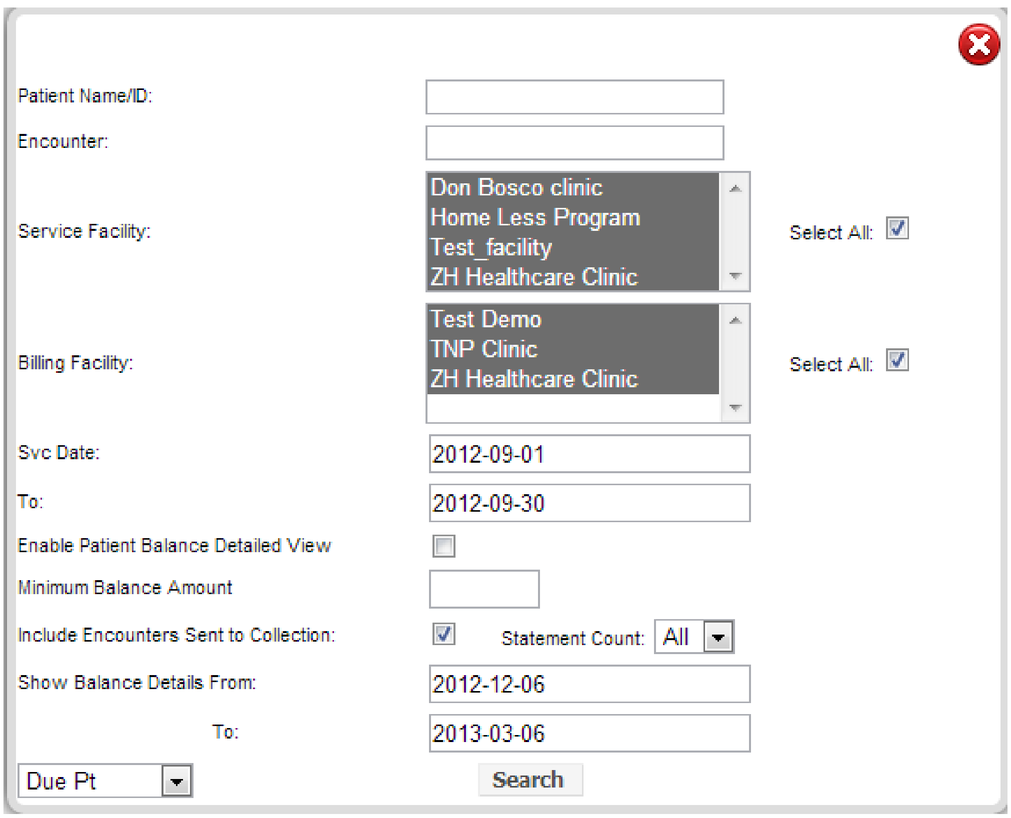
The pop-up window shown below will appear on your screen



The detailed search option in OpenEMR gives you flexibility to create any kind of patient statement you need by entering specific information in the required fields.

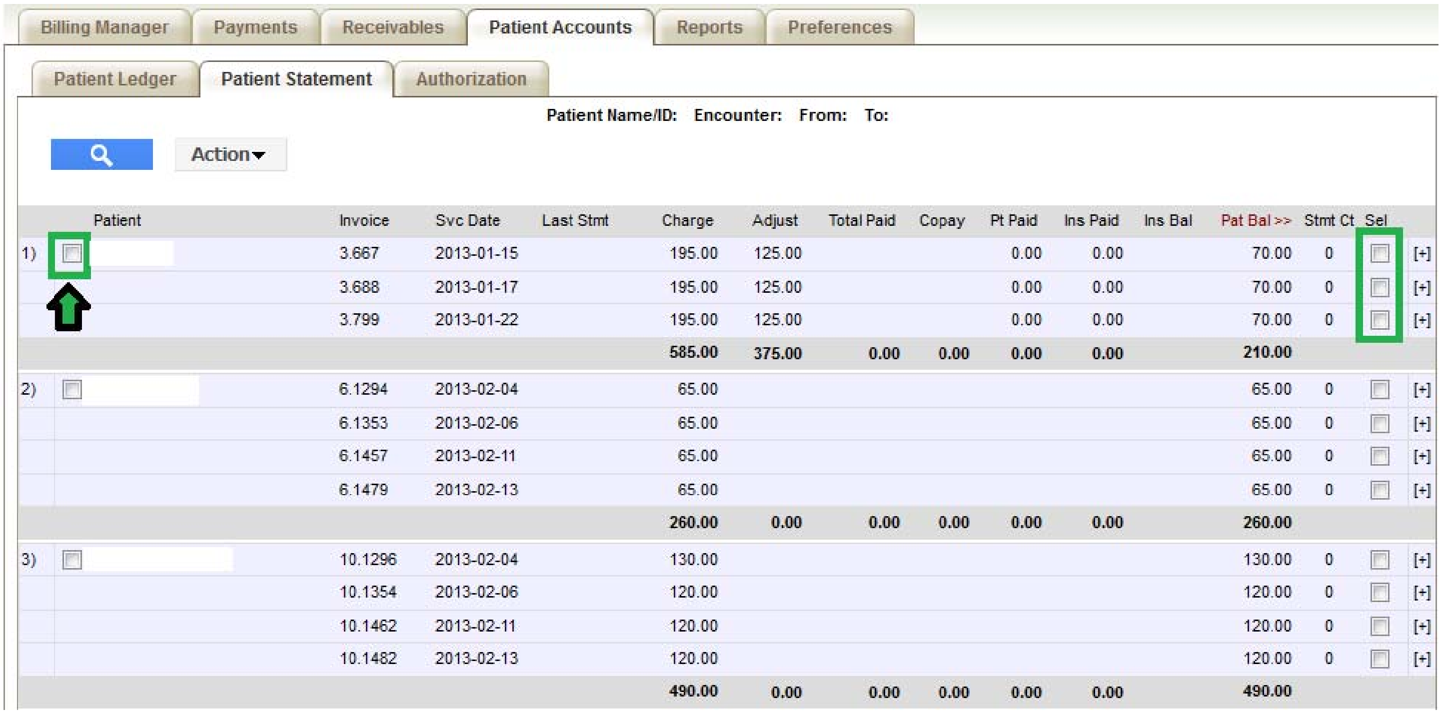
1. “Patient Name/ID” field needs to be filled if you need a statement for a specific patient.
2. “Encounter” can be filled, if you know the encounter number for a date of service.
3. “Service Facility” Single or Multiple facilities for which you needs statements.
4. “Billing Facility” Single or Multiple facilities for which you needs statements.
5. “Svc Date” Date of service needs to be entered if you need a statement for a specific patient for a specific date of service. It can also indicate the start date of a period of time for which you need a statement.
6. “To” will be end date of service for a period of time between the state date (Svc Date) and the end date entered here.
7. When the “Enable Patient Balance Detailed View” is checked you can see the balance, number of statements and dates in which they were generated, and any notes that might pertain to that account.
8. “Minimum Balance Amount” allow you to determine the minimum balance you want the statements for.
9. “Statement Count” allow you to keep track of how many statements have been sent for a particular patient.
10. Even when the account is sent to Collections, a statement can be generated by checking the box marked “Include Encounters Sent to Collections.”
11. “Show Balance Details From/To” allows you to see all details for activity in a period of time determined by the start and end date selected.
12. In the drop-down box you can select to generate statements for amounts “Due from patient” or “Insurance” or all of them together.
13. You click on the “Search” button after you have filled all relevant fields accordingly in order to generate the statements.

Let’s try generating statements for all patients for a specific amount of time (Monthly statements. e.g.) for September 2012. You enter the start date of service in the third box (Svc Date) and the end date of service in the fourth box (To) as shown in the screen below.



Clicking on the “Search” button will bring the below screen.

*** Patient Names are removed for security reasons.

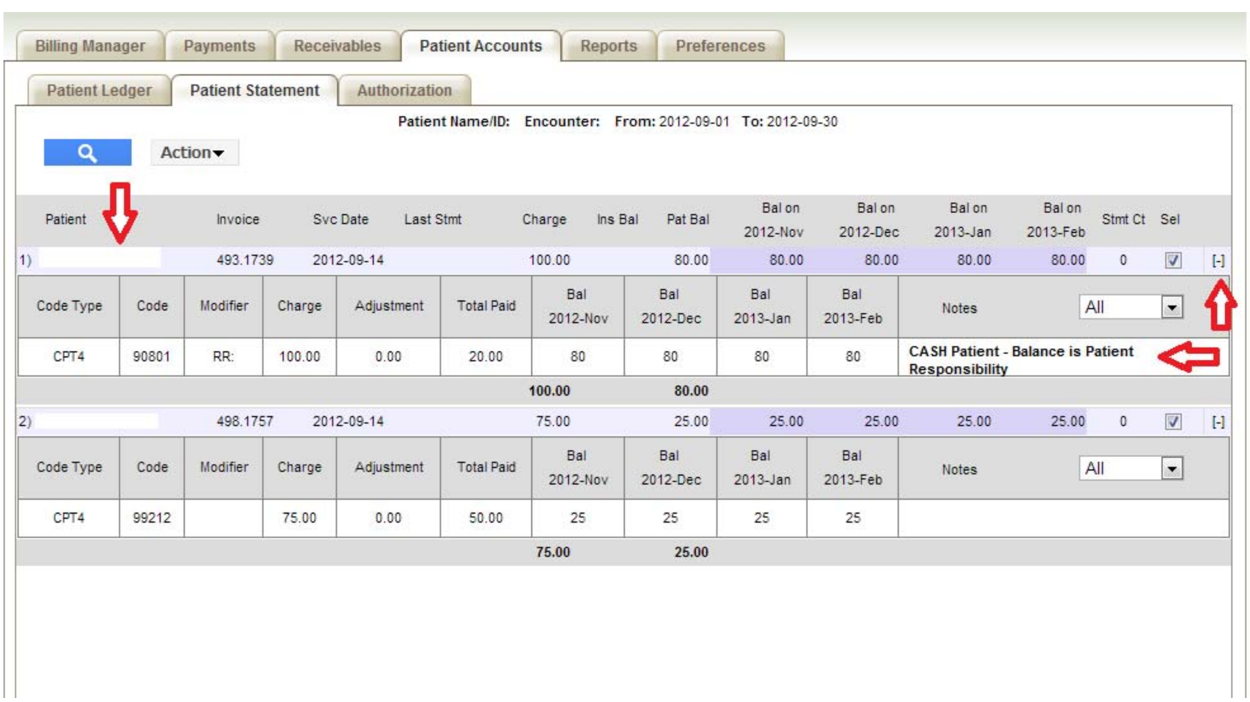


	Patient	Invoice	Svc Date	Last Stmt	Charge	Adjust	Total Paid	Copay	Pt Paid	Ins Paid	Ins Bal	Pat Bal >>	Stmt Ct	Sel	
1)	☐	3.667	2013-01-15		195.00	125.00			0.00	0.00		70.00	0	☐	[+]
		3.688	2013-01-17		195.00	125.00			0.00	0.00		70.00	0	☐	[+]
		3.799	2013-01-22		195.00	125.00			0.00	0.00		70.00	0	☐	[+]
					585.00	375.00	0.00	0.00	0.00	0.00		210.00			
2)	☐	6.1294	2013-02-04		65.00							65.00	0	☐	[+]
		6.1353	2013-02-06		65.00							65.00	0	☐	[+]
		6.1457	2013-02-11		65.00							65.00	0	☐	[+]
		6.1479	2013-02-13		65.00							65.00	0	☐	[+]
					260.00	0.00	0.00	0.00	0.00	0.00		260.00			
3)	☐	10.1296	2013-02-04		130.00							130.00	0	☐	[+]
		10.1354	2013-02-06		120.00							120.00	0	☐	[+]
		10.1462	2013-02-11		120.00							120.00	0	☐	[+]
		10.1482	2013-02-13		120.00							120.00	0	☐	[+]
					490.00	0.00	0.00	0.00	0.00	0.00		490.00			

The report header has all the information to look in-to. Since this is the first time sending out patient statements from OpenEMR there is no value under “Statement Count”

Clicking on the check box on the left side (next to Patient Name) will select the entire encounters for that patient.

the patient’s name you can view the Demographics. By clicking [+] sign you can view the notes if there are any. (You can see the notes for the first patient)



	Patient	Invoice	Svc Date	Last Stmt	Charge	Ins Bal	Pat Bal	Bal on 2012-Nov	Bal on 2012-Dec	Bal on 2013-Jan	Bal on 2013-Feb	Stmt Ct	Sel	
1)		493.1739	2012-09-14		100.00		80.00	80.00	80.00	80.00	80.00	0	☑	[-]

Code Type	Code	Modifier	Charge	Adjustment	Total Paid	Bal 2012-Nov	Bal 2012-Dec	Bal 2013-Jan	Bal 2013-Feb	Notes	All
CPT4	90801	RR:	100.00	0.00	20.00	80	80	80	80	CASH Patient - Balance is Patient Responsibility	

				100.00	80.00

	Patient	Invoice	Svc Date	Last Stmt	Charge	Ins Bal	Pat Bal	Bal on 2012-Nov	Bal on 2012-Dec	Bal on 2013-Jan	Bal on 2013-Feb	Stmt Ct	Sel	
2)		498.1757	2012-09-14		75.00		25.00	25.00	25.00	25.00	25.00	0	☑	[-]

Code Type	Code	Modifier	Charge	Adjustment	Total Paid	Bal 2012-Nov	Bal 2012-Dec	Bal 2013-Jan	Bal 2013-Feb	Notes	All
CPT4	99212		75.00	0.00	50.00	25	25	25	25		

				75.00	25.00

If you do now want to print the statement for any particular patient for any reason you can simply uncheck the  (Ticket mark)

The “Action” button allows you to make several choices before you generate the statements. When you click on it a drop-down menu appears, as shown in the screen shot below.

1. You can select All
2. You can Clear All selection
3. You can View as PDF
4. Generate PT Stmt (Which would be last Action)
5. You can do bilk write Off
6. You can send it to Collections
7. You can move all the “Due Ins” to Patient account.
8. You can view as CSV

You can review the statements by choosing “View as PDF” or “View as CSV). After completing the review you can choose the option **Generate PT Stmt** to print the statements in the respective printer and for all the printed patient account the last statement sent date will be updated as “Current Date” and the statement Count will be updated as “1”.