

Next Step Billing

Print a Statement

Last Modified on 12/13/2024 9:55 am EST

Path: Scheduler > Reports

About

To maintain a healthy client A/R, it is recommended to send statements, which can easily be printed in-house, on a regular basis. It is important to have an understanding of how the Billing Engine functions so that you provide your clients with accurate statements. Make sure that Services have been converted into Line Items so that a copay line is generated in the system for the client (you don't have a billed amount for the client until the Service becomes billable).

Print a Statement

1. Navigate to Reports in the Scheduler by following the path above.
2. Select the statement you want to print from the reports list.
3. Fill out the following:
 - o **Patient:** Select a Patient or leave blank to select All.
 - o **Service Date:** Select a **Service Date** or leave blank to select All.
 - o **Activity:** Select All, and uncheck **Payments** in the drop-down.
 - o **Balance Greater than:** Enter a Balance Greater than here if applicable to your filter.
 - o **Due Date:** Leave the default Due Date as Today.
 - o **Pay Source:** Set the Private Pay Source if available.
4. Click the **Quick Print** button. The statement will open in a PDF to preview.
5. Click the **Printer** icon.



6. In the Print window, select a printer from the **Destination** drop-down menu.

Print		893 sheets of paper
Destination	SUPPORT-Color-HP La	
Pages	All	
Copies	1	
Color	Color	
More settings		▼

7. Click the **Save** button.

