



Customize Statements in Office Therapy®

Office Therapy statements can range from simple to complex, depending on your client's needs and your preferences.

Under the Bill Setup tab in Client setup, you can choose from 3 Format options: Basic, Your Portion, or e-Statements. The latter is used to send statements to the Trizetto clearinghouse for mailing or posting on-line. This option allows for a greater degree of customization.

The **Basic Bill Format** shows transactions for a selected period and the amounts, including Insurance and Patient portions.

Date	Charges And Credits	Amount
	Previous Balance	310.00
08/28/1998	Payment made by World Insurance (Ref#: 114587)	-75.00
08/28/1998	Client Payment	-40.00
09/18/1998	Individ. psych., insight oriented; 45-50 minutes	110.00
09/22/1998	Payment made by World Insurance (Ref#: 1225963)	-80.00
09/24/1998	Payment made by World Insurance	-160.00
09/30/1998	Individ. psych., insight oriented; 45-50 minutes	110.00
10/01/1998	Payment made by Managed Care First	-10.00
09/14/2001	Indiv. psych. insight orient,20-30 min w/ med eval	110.00
	Total	\$275.00

The **Your Portion Bill** Format shows transactions for a selected period, with a column for the total and one for the patient portion.

This format is often easier for patients to follow. They can see the total charged and what they owe for each service with the total at the bottom.

In the example below, only charges are shown; no payments are on the statement.

Date	Charges And Credits	Amount	Your Portion
09/18/1998	Individ. psych., insight oriented; 45-50 minutes	110.00	20.00
09/30/1998	Individ. psych., insight oriented; 45-50 minutes	110.00	20.00
09/14/2001	Indiv. psych. insight orient,20-30 min w/ med eval	110.00	20.00
	Total	\$330.00	\$60.00
	Please Pay		\$60.00

If you want payments to be displayed, you can select that when running bills. Below is an example of adding payments to the statement.

Date	Charges And Credits	Amount	Your Portion
	Previous Balance	310.00	40.00
08/28/1998	Payment made by World Insurance (Ref#: 114587)	-75.00	
08/28/1998	Client Payment	-40.00	-40.00
09/18/1998	Individ. psych., insight oriented; 45-50 minutes	110.00	20.00
09/22/1998	Payment made by World Insurance (Ref#: 1225963)	-80.00	
09/24/1998	Payment made by World Insurance	-160.00	
09/30/1998	Individ. psych., insight oriented; 45-50 minutes	110.00	20.00
10/01/1998	Payment made by Managed Care First	-10.00	
09/14/2001	Indiv. psych. insight orient, 20-30 min w/ med eval	110.00	20.00
	Total	\$275.00	\$60.00
	Please Pay		\$60.00

Other options on statements include:

Under Client setup – Bill Setup

- Print client name – Prints the client's name in the top left part of the Statement
- Print diagnosis – Prints the client's diagnosis code(s) (e.g. F34.1) in the top left part of the Statement
- Print first visit date – Prints the client's 1st visit in the top left part of the Statement
- Print provider information – Prints the rendering provider name in the top left part of the Statement
- Print Procedure code – Prints the procedure code for the charge. For example:

Date	Procedure	Charges and Credits	Amount	Your Portion
09/09/2016	90834	Individual therapy 45 minute	\$100	\$20.00

Option when generating the Statements Using the Billing Wizard

These options can be set when generating a statement. They are saved so that the next time you generate statements, the same settings are used.

- Only include charges – check this to show charges only and not show payments
- Include Uncharged Scheduled Appointments – by checking this option, appointments not charged are listed on the statement

Billing Expert

Reproducing bill for: Davidson, Paula

Enter Date Range Of Bill

From: 08/28/1998 ...

To: 09/14/2001 ...

Indicate If Bill Should Be Charges Only

Only include charges?

Include Uncharged Scheduled Appointments

[Click to Display Transactions](#)

	Date	Charge	Amount
1	8/28/1998	Payment	(\$75.00)
2	8/28/1998	Payment	(\$40.00)
3	9/18/1998	90806	\$110.00
4	9/22/1998	Payment	(\$80.00)
5	9/24/1998	Payment	(\$160.00)
6	9/30/1998	90806	\$110.00
7	10/1/1998	Payment	(\$10.00)
8	1/12/2001	90806	\$0.00
9	9/14/2001	90805	\$110.00
10			
11			
12			

- Overdue messages – you can print an overdue message based on the number of months without payment, print aging information (e.g. 30/60/90 days), or omit an overdue message
- Print your company name and address with or without phone number - shows at the top of the statement
- Print your Provider's name and address - shows at the top of the statement. Also see Provider setup to select data to print to Statements (Tax ID, License, NPI)
- Do not print company nor provider name or address
- Print insurance filing history – this will display along with the charge line, when the charge was filed to insurance (e.g. Individual Therapy 45 minutes(filed to Blue Cross on 2/12/2015))
- Print deductible notes – when entering a payment and using the Apply to Deductible to reallocate the amount to the patient, this option shows the details of that reallocation on the statement.

In the example below, the insurance company did not pay the entire amount because there was a deductible. So, of the total amount of \$100, the insurance paid \$50 and you shift the other \$50 to the patient for the deductible.

Payment/EOB: Johnny AKApple

Payment My Fields

Date: 02/08/2016

Paid By: Blue Cross of Ohio

Payment Amount: \$50.00

Current Method: Check

Ref No.:

Provider: Arnie Schuster

Existing Credits: \$0.00 Apply credits

Outstanding Charges (Show all?)

	Date	Action	Amount Charged	Responsible For	Paid To Date	Amount Due	Amount Paid	Apply To Deductible	
1	2/8/2016	90834	120.00	100.00	0.00	100.00		50.00	✓
2	2/15/2016	90834	120.00	100.00	0.00	100.00	50.00		✓
Totals			\$240.00	\$200.00	\$0.00	\$200.00	\$50.00	\$50.00	

Goto Charge OK Cancel

The Statement will reflect that the deductible was applied to the patient.

02/08/2016 Payment made by Blue Cross of Ohio (a \$50.00 deductible was applied to charges on 02/08/16) -50.00

- Print separate payment totals – As opposed to a simple display of what the patient owes, this option will show a breakdown of any previous balance, total charges, total payments, a total, and a Please Pay line.

	Amount	Your Portion
Previous Balance	0.00	0.00
Total Charges	\$240.00	\$140.00
Total Payments	\$90.00	\$40.00
Total	\$150.00	\$100.00
	Please Pay	\$100.00

- Print future appointments
- Enter Title to appear on Statements (default is Statement, but you can use this to change the title)
- Optional message appearing at bottom of Statement – you can enter a message which displays at the bottom

Billing Expert

Bill customization options

Select Printer: RICOH MP C2503 PCL 6

Date to print on bills: 02/12/2016

Return Address Options

- Print the Company's name and address Include phone number?) Left: 1.2 Inches
- Print the Provider's name and address Top: 1.1 Inches
- Do not print a return address

Bill To Address Options

Print Bill To address on: Left Side Right Side Position: 1.04 Inches Top: 2.6 Inches

Additional Print Options

- Print insurance filing history?
- Print deductible notes?
- Print separate payment totals?
- Print future appointments?

Title on Bills: STATEMENT

Optional message to appear at the bottom of each bill: Office Therapy DemoTax # 11 - 1234564

Print Client Bills to Separate PDF File(s)

Buttons: Cancel, < Back, Next >, Finish

Adding your logo to the top of statements

To add your logo, go to File...Administration...Maintain Company Information.

Enter company information. To the left of the company data, click Browse. Navigate to the location of your logo. It can be in BMP or JPG format, and should be no larger than about 500 by 300 pixels. You can scale the image by stretching, or zooming, or using the normal size. Click the Preview Button to see how it looks for each setting. When satisfied, click OK to save.

The example below shows the logo with the company information and other options from the billing wizard.



STATEMENT

DocuTrac, Inc.
1800 Dual Highway
Hagerstown, MD 21740
(301) 766-9397

Date: 02/12/2016
Client: Paula Davidson
Diagnosis: F43.22 R37 F34.1 F41.1 F81.89
First Visit: 8/7/1997
Provider Name: Janet Svenson

Paula Davidson
102 Pittsfield Rd
Baltimore, MD 21208

Date	Procedure	Charges And Credits	Amount	Your Portion
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