

# Batch Print Statements for outstanding charges

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Follow the steps below to batch print statements.


1. Select **Patient > Statement Batch Print**.
2. Enter your **Search Criteria** or [Load a Search Filter](#).
  1. Use the **Type** option to select which statement types are included in your search results.
    1. **Statement for outstanding charges:** Select this option to search for statements for outstanding charges.
    2. **Payment Plan Statement:** Select this option to search for payment plan statements.
    3. **Final Demand Notice:** Select this option to search for FDN statements.
  2. Use the **Statement Amount** drop-down menu to filter your search by a dollar amount.
  3. Use the **Electronic Statements Sent** drop-down menu and populate a number to filter your search for patients based on the number of electronic statements sent.
  4. Use the **Paper Statements Sent** drop-down menu and populate a number to filter your search for patients based on the number of paper statements sent.
  5. Use the **Total Statements Sent** drop-down menu and populate a number to filter your search for patients based on the total number of statements sent (paper + electronic).
  6. Use the **Days Since Last Statement** drop-down menu and populate a number to filter your search for patients based on the age of the statement(s).
  7. Use the **Days Since Last Seen** drop-down menu and populate a number to filter your search for patients based on the last seen date, allowing offices to hold statements until a patient has been discharged.
  8. Use the **Statement Times Printed** drop-down menu to filter your search for patients based on the age of the statement(s).
  9. Use the Patient **Account Type** drop-down menu to select the account type(s) to search for.
  10. Use the Patient **Default Provider** drop-down menu to filter your search by the patient's default provider.
  11. Use the Patient **Default Referring Provider** drop-down menu to filter your search by the patient's default referring provider.
  12. Use the **Charges to include** options to select what charge status(es) will be included in the statements:

1. **Balance Due Patient:** Include charges that are set to Balance Due Patient on the statement
2. **Balance Due Patient, Pending Patient or at Collection** Include charges that are set to Balance Due Patient, Pending Patient or set to Collections on the statement.
3. **All charges, including Paid:** Include all charges on the statement. This will also include charges marked as Paid.
4. **Custom:** Use the drop-down menu to select which charges status you would like to include on the statement.

13. Place a check in the box to **Include all charges, including Paid** in the search results.

14. Place a check in the box to **Separate Statements:**

1. **By Provider:** The system will print separate statements for charges associated with different providers.
2. **By Practice:** The system will print separate statements for charges associated with different practices.
  1. Use the **Practice** field to filter statements based on a specific practice.
3. **By Claim:** The system will print a separate statement for an individual claim's charges.


 Selecting the option to Separate Statements "By Claim" will include any account debits (debits not attached to a claim) as their own statement.

15. Place a check in the the box to **Show the patient's last payment** in the search results.

16. Place a check in the box for **Do not include account credits on statement** to remove credits on the patient's account and exclude them from being calculated in the **Balance Due** on the statement.

3. Click the **Search** button.


4. **Optional:** Click the  icon to edit your search criteria.

 Sort your search results. Visit our [Reorder Table Columns Help Article](#) for detailed steps on how to hide, rearrange or add header columns.



5. You're able to interact with the search results by **right-clicking** on a row.

1. **Copy:** Copies the statement information to your clipboard.
2. **Open Patient:** Opens the patient associated to the selected statement.

6. Place a check in the box next to the Patient Name(s) you wish to print/preview.
7. Click the **Preview** button to view statement content before generating activity.
8. Once ready to print, click the **Print** button.

 This will update the statement information and add an activity line to the patient's account which will record the statement was printed, so that printed statements are not batched again.

1. Select the **type of Statement** you want to print/preview by clicking on **Enhanced Statement or Plain Text Statement**.
  2. A new tab with a print dialog window will open, select **Print** again.
9. After printing a statement, the following right-click options become available.
1. **Delete Activity for all previously printed statements** Removes the memo line for all sent statements from the patient's activity page stating a statement has been sent. This is typically used if a statement was printed or sent in error.
  2. **Reprint all previously printed statements**: Reprints all of the statements that have been printed for this patient.
  3. **Delete Activity for this statement only**: Removes the memo line for this sent statement from the patient's activity page stating a statement has been sent. This is typically used if a statement was printed or sent in error.
  4. **Reprint this statement only**: Reprint the statements that have been printed for this patient.
10. Click **Close**.

 Once printed, the checkbox will be replaced by a  icon that will mark it as "printed." One or more statements previously printed can be reprinted by right-clicking on the print icon.

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