

Statement Printing

Statement Printing

SequelMed will generate a statement anytime a patient has an outstanding balance. These statements can be printed collectively or on an individual basis. Additionally, SequelMed will continue to print statements if a patient balance still exists and will attach corresponding dunning message based on the age of the statement. To print statements, you must first setup the statement messages, then the statement groups.

Statement Messages

The Statement Message window is where you can add/modify the messages that will show up on patient statement. Once created, these messages must be linked to the statement message field located in the practice table. Thus, allowing the statement messages to be specific to the practice. When you click on the Statement Messages option, the following window will open:

- Statement Message Find Criteria window
 - You have the option of searching by:
 - Name – The name assigned to the message
 - Message – The body of the message
 - Retrieve All – Check this box to retrieve all messages
 - Type – A specific message type

Required Fields	Hot Keys
There are no required fields	<ul style="list-style-type: none"> • F – Find Button • D – Details Button • N – New Button • D – Delete Button • P – Print Button • H – Help Button • X – Exit Button • R – Retrieve All Button

To create a new statement message you can click on the new button which will open up the statement message window:

Required Fields	Hot Keys
N – Name M - Message	<ul style="list-style-type: none"> • N – New Button • D – Delete Button • H – Help Button • S – Save Button • X – Exit Button

- Name – This field is used to define the name of the statement message. Please note there is no limit to the number of statement messages that can be created. Additionally, SequelMed will automatically age the statement once it has been printed. As the statement ages, Sequel will mandate within the Statement Group window a message for the current balance, over 30 day, over 60 days, over 90 days, and over 120 days. So, it is advised when creating statement messages, that the name of the statement message correspond with the age of message.
- Type –
- Message – This field is where a user can type in the message that corresponds with the name

Statement Group

Statement Group window is where you can create a group that defines a default Statement Message, 30 60 90 and 120 Msg. You are also able to define the Outstanding Days, # of statements and cycle days. The statement group is linked to these messages via the drop down menu in the Statement group details window.

- Statement Group Find Criteria
 - You have the option of searching by:
 - Name – The Name of the Statement Group
 - Description – The Description of the Statement Group
 - Retrieve All – Check this box to retrieve all possible Statement Groups

Required Fields	Hot Keys
There are no required fields	<ul style="list-style-type: none"> • E – Description Button • R – Retrieve All • F – Find Button • T – Details Button • N – New Button • D – Delete Button • P – Print Button • H – Help Button • X – Exit Button

To create a new statement message you can click on the new button which will open the Statement Group window

Required Fields	Hot Keys
Name Message Above 30 Message Above 60 Message Above 90 Message Above 120 Message Outstanding Days # Statements Cycle Days	<ul style="list-style-type: none"> • N – New Button • D – Delete Button • H - Help Button • S – Save Button • X – Exit Button

When Creating a New Statement Group, You have the option to populate the following fields:

- Name – Name of the Statement Group
- Message – This Field is where you can select the “Current” Message that will print on the Statement. The messages you can choose from are the messages created previously in the Statement Messages Section.
- Above 30 Message – This Field is where you can select the “30 Day” Message that will print on the Statement. . The messages you can choose from are the messages created previously in the Statement Messages Section.
- Above 60 Message - This Field is where you can select the “60 Day” Message that will print on the Statement. . The messages you can choose from are the messages created previously in the Statement Messages Section.
- Above 90 Message - This Field is where you can select the “90 Day” Message that will print on the Statement. . The messages you can choose from are the messages created previously in the Statement Messages Section.
- Above 120 Message - This Field is where you can select the “120 Day” Message that will print on the Statement. . The messages you can choose from are the messages created previously in the Statement Messages Section.
- Outstanding Days - This field chooses the amount of days, SequelMed will wait until it puts an unpaid Statement, back in to statement bucket.
- # Statements – This is where you will enter the amount of statements that will go out before SequelMed sends the statement to the Patient Follow-up Bucket.
- Cycle Days – # of days you that will pass before the statement goes out to the patient again.
- Description – Text field used for describing the Statement Group.

Printing Statements:

Statement printing is accomplished by entering the “Statement Printing Bucket” through the “Batch” menu or using the function key, F12. The statement printing bucket is where statements reside when a patient has an outstanding balance. A statement is printed when you select a statement from the found data window, and hit the “Statement” Button. A statement can be sent electronically by selecting the “EDI” Check box and choosing an “FTP Vendor”. This will allow statements to be sent electronically via FTP. Printing a statement is accomplished by highlighting the selected statement or by selecting the checkbox “Select all” and hitting the “Statements” Button.

- Statement Printing Find Criteria
 - You have the Option of searching by:
 - Group - This Home Key Driven field allows you to select a group (
 - Provider - Short Name of the Provider
 - Age: Use Drop Menu to Select Age of Statement
 - Age Amt:
 - From Last Name / To: First Letter of the Last name of Statement Recipient
 - Statement: Your Default Statement Specified in the System Options
 - Visit From Date: Beginning Range of Visit Date
 - Visit to Date: Ending Range of Visit Date
 - Reprint All: Allows previously printed statements to be Reprinted
 - Patient Comment Color: Choose a patient comment color
 - Type: Type of Statement

Required Fields	Hot Keys
<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • T – Patient • L – Letter • S – Statements • M – Margins • F – Find • P – Print • H – Help • X – Exit • G – Group • V – Provider • E – Age • Y – Yes (Reprint All)

Button Definitions:

Patient: Brings up the Patient Demographics of the Selected Statement

Letter: Allows you to print a letter to the Recipient of the Selected Statement

Statements: Print the selected statements

Set Flag: Allows you to tell the system that the Selected Statement has already been printed

Margins: Allows you to setup the Proper Margins for Printing statement to the Selected Printer.

Fields:

Account Number – Patients Account Number

Patient – Patients Last Name, First Name

Provider – Short Name of the Provider

Payment Last Date – Date of the last Patient Payment

Amount Last Paid – Amount of the Last Patient Payment
 Advance Payment- Amount of the Patient Advance Payment
 Patient Balance – Remaining patient responsibility balance on this Patients account
 Plan Balance – Remaining plan responsibility balance on this Patients account
 Message Level –
 Last Statement Print Date – Date of most recent print of this statement
 Last Statement Print Days – Amount of days since the statement was printed
 Last Statement Print Type – Type of statement at the time of last print (ex Open, EDI,All)

Pending Statements

The Pending statement Bucket is where SequelMed will place Statements that have been selected for printing, but the Printed Statements have not been verified. When you print a statement through the “Statement Printing” screen, SequelMed will ask if the Statement has been printed properly. If you select the Pending option, SequelMed will push these selected statements into the “Pending Submit Bucket”. Here the User can Cancel the Statement, Set the Flag which tells the system it has been printed properly, or Print the statement again.

- Pending Statements Find Criteria
 - You have the option of searching by:
 - From Pending Date – The start date range of your search
 - To Pending Date – The ending date range of your search
 - Account # – The Account number of the Patient
 - Practice – The Short Name of the Practice
 - Location – The Short Name of the Practice
 - Provider – The Short Name of the Provider

Required Fields	Hot Keys
<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • C – Practice • O – Locations • V – Provider • S – Select all • F – Find • P – Print • H – Help • X – Exit

Button Definitions:

Select Pat: Brings up the Patient Demographics of the Selected Statement

Set Flag: Allows you to tell the system that the Selected Statement has already been printed

Cancel Statement: Cancels the Printing of this statement

Fields:

Account # - Patients Account Number

Patient – Patients Last Name, First Name

Payment Last Date – Date of the last Patient Payment

Amount Last Paid – Amount of the Last Patient Payment

Patient Balance – Remaining patient responsibility balance on this Patients account
 Plan Balance- Remaining plan responsibility balance on this Patients account
 Last Statement – Displays the last type (ex: Open, EDI).
 Last Statement Date – Date of the last statement
 Days Last – The Amount of days the statement has been in the Pending Statement bucket

Statement printing from the Patient menu:

To print a statement from the Patient menu, a patient must be selected first and the patient name must populate the title bar. This will allow you to open the statements related to this patient. When working with statements from the patient menu, you will only be able to print and view statements for the selected patient.

Patient Statements Open:

This window allows the user to view and print the open Patient Statement. When you hit the “Find” button, the actual open statement will display. This is the exactly how the statement will look when it is printed. The statement can be broken down by the search parameters.

- You have the option of searching by:
 - Visit from Date
 - Visit to Date
 - Statement Message
 - Practice - Short Name of the Practice
 - Location - Short Name of the Location
 - Provider - Provider

Required Fields	Hot Keys
<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • D– Visit From Date • T – Visit To Date • S – Statement Message • A – Practice • V – Provider • F – Find • P – Print • H – Help • X - Exit

Patient Statements All:

This window allows the user to view and print the All Patient Statements, not just the Open statement. When you hit the “Find” button, the actual statement will display. This is the exactly how the statement will look when it is printed. To print the displayed statement, hit the “Print” button. The statement can be broken down by the search parameters.

- You have the option of searching by:
 - Visit from Date
 - Visit to Date
 - Statement Message
 - Practice
 - Location Provider

Required Fields	Hot Keys
<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • D- Visit From Date • T – Visit To Date • S – Statement Message • A – Practice • V – Provider • F – Find • P – Print • H – Help • X - Exit

Patient Statement History:

The Statement History window is used to view the history of statements sent to the selected patient.

- When searching for Statement history you have the option of searching by:
 - From Printing Date – The starting range of the printing date
 - To Print Date – The ending range of the printing date
 - Statement Type – The type of statement
 - Printed By – The User name of who printed the statement
 - Retrieve All – Shows all statement history

Required Fields	Hot Keys
<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • D – From Print Date • S – Statement Type • A – Practice • R – Retrieve All • F – Find • T - Details • P – Print • H – Help • X - Exit

Fields:

- Print Date – Date Printed
- Type – Type of Statement
- Printed By – User name of who printed the statement
- Amount – Total amount of the Statement

Statement Visits:

To access the statement History information, Double click the line Item in the Patient history screen. This will open the Statement visits window. Here you can view the following.

- Visit Date - Date of the selected visit
- Visit Number - Visit # assigned by sequel at the time of charge entry
- Location - Location where the visit took place
- Provider - Provider assigned to the selected visit
- Referring Provider - Referring provider assigned to the selected visit
- Plan - Short name of the Insurance Plan
- Fee - The fee amount of the selected line item
- Patient Balance - Remaining patient balance of the selected visit

- Plan Balance - Remaining plan balance of the selected visit
- Charge Co-pay Balance - - Remaining co-payment balance of the selected visit
- Submitted - Whether or not the visit has been submitted
- Status - Where the claim is residing (ex: Follow-up)
- Last Statement date - Date the statement went out last
- Last Statement Amount - The amount of the last statement

Buttons:

- Co-pay - Shortcut to the Payment screen to apply a co-payment to the selected visit.
- Payment – Shortcut to the Payment screen to apply a payment to the selected visit.
- Exit - Exits this window