

# Statement Series

May

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This document was developed by Genius Solutions to introduce users to the Statement Series feature. Click on the text or page numbers within the Contents page to be brought to that specific item within the document.

eTHOMAS

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## Statement Series

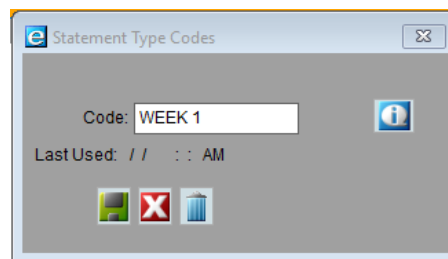
A new feature called Statement Series Type has been added to patient statements. This feature allows users to run statements for specific groups of patients. For example, an office may want to prepare statements for patients at the beginning of the month, except for patients who have Medicare. Those Medicare patients could receive their statements separately, later in the month.

## Access to Statement Series

Users will need to assign access to this feature. From Utility | Settings | Groups, edit the desired group, scroll to the Code Files category and set StatementTypeCode to Full Access.

## Code Files

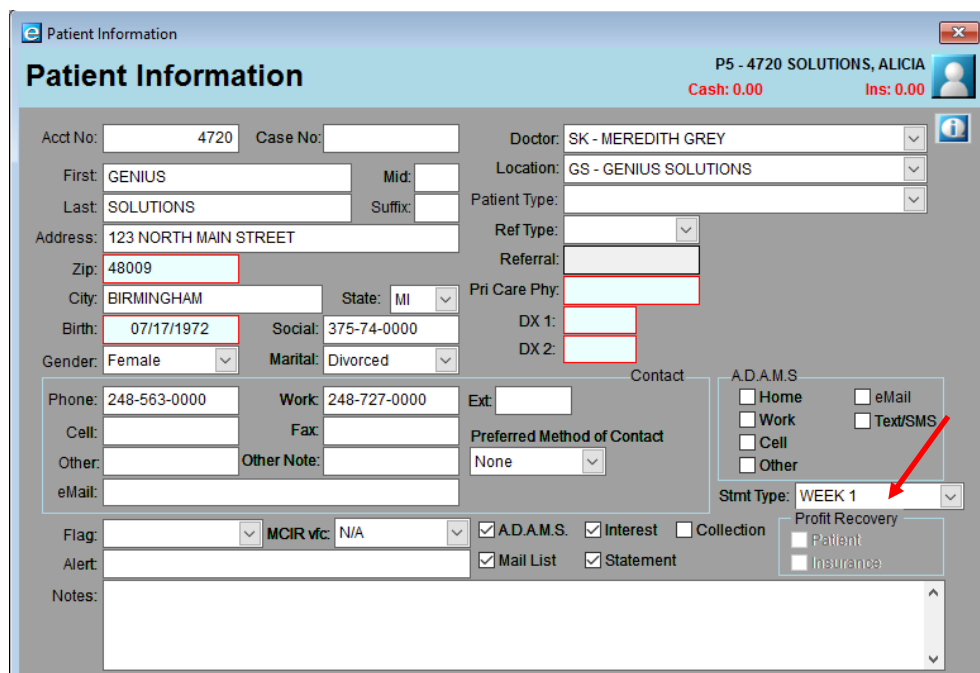
You must first create a code file for the series type. This is done under Code Files | Other | Statement Series Type. Add the codes you wish to use. These codes can be named whatever you choose, up to 10 characters.



- **Code** – Enter the code for the series. This is the code you will assign to the patient account.
- **Last Used** – This field will update each time this series type is added to a patient.

## Patient Information

In the Patient Information screen, choose the applicable Stmt Type from the drop-down.



## Preparing Statements

When statements are prepared, be sure to choose the correct Series type.

The screenshot shows the 'Statements' window in the eTHOMAS software. The window title is '777774 - GENIUS SOLUTIONS'. The left sidebar contains a menu with 'Statements' highlighted. The main area contains the following fields and options:

- Date From: 04/18/2017
- Date To: 05/18/2017
- Range: All Patients
- Statement Type: Running Total
- Cash or Cash/Ins: Cash
- Family/Individual: Individual
- Order By: Last Name
- Location: System Summary
- Doctor: System Summary
- Patient Series: WEEK 1
- Minimum Cash Balance
- Minimum Number of Days Since Last Statement
- ☐ Diagnosis on Statement
- ☐ Cycle Statements
- Prepare

Only patients whose accounts have that Series type will prepare.

The screenshot shows the 'Statement Prepare' window. The window title is 'Statement Prepare'. The left sidebar contains the following information:

- Patients Found: 1
- Bad Found: 0
- Patients Selected: 1

The main area contains a table with the following columns: Account, Name, Bal, LastPayDt, LastPayAmt. The table has one row with data: 4720, GENIUS SOLUTIONS, 155.00, 09/23/2014, 346.44.

The bottom section contains the following steps:

- Step 1 Prebilling: Print, Display on Screen, View Bad, Show Detail
- Step 2 Alignment: Top Margin: 0, Left Margin: 0, Test, Save
- Step 3 Messages: Line 1: BILLING QUESTIONS? CALL 586-000-0000, Line 2: MAKE CHECKS PAYABLE TO GENIUS SOLUTIONS, Permanent: Edit
- Step 4 Prepare Statements: Prepare, Display on Screen

## Special Consideration

It is important to note that if a statement series is not chosen when preparing statements, all patients could potentially receive a statement. This could result in those with a statement series getting a statement twice. Therefore, if your office is going to utilize Statement Series, we recommend having a type assigned to every patient. In the example detailed above, Medicare patients would have something like "Week 3" assigned to them, whereas all other patients would have a series of "Week 1".