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## Statements

Before printing statements you should review the settings for messages and printing options. Review the setup instructions in the Datacon Manual. The instructions in this manual assume you are on the latest software using the new statement routine instead of the “classic” routine.

### How to Get There

- **SELECT** *Statements* from the *Main Menu*. The first screen will appear with six options (Figure 1)

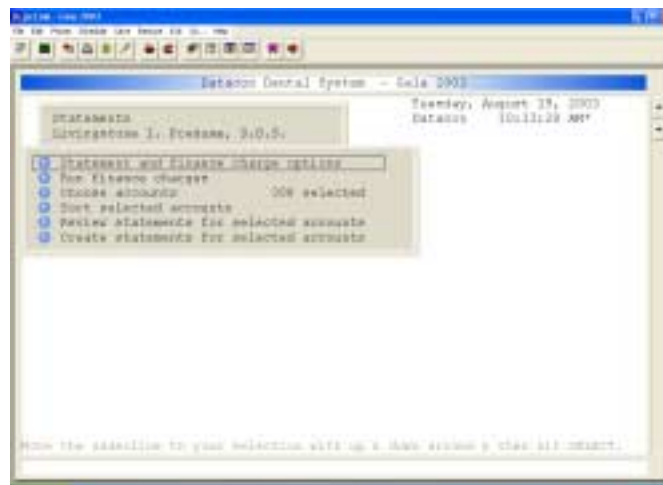


Figure 1: New Statement Menu

### Running Finance Charges

- **SELECT** *Run finance charges*>*Compute finance charges*
  - Run finance charges once per month. All accounts are computed even if you are only printing statements for a few accounts.

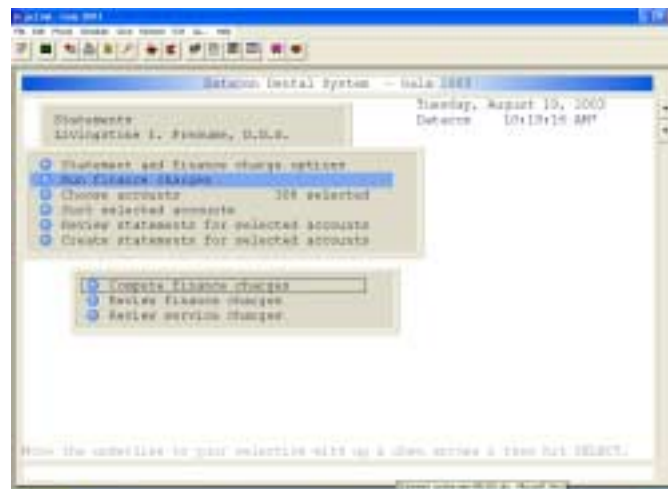
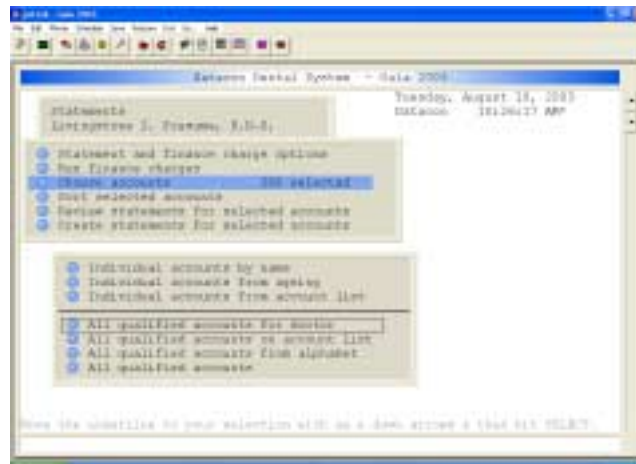


Figure 2: Statements – Run Finance Charges Screen

## Choosing Accounts

- **SELECT** *Choose accounts*. A menu displays (Figure 3) that offers various methods of selecting accounts to be printed:



**Figure 3:** *Statements – Choose Accounts Menu*

- Individual accounts
  - *By name* – select individual accounts, alphabetical order
  - *From ageing* - select individual accounts, ageing order
  - *From account list* – select individual accounts which have been previously placed on a user defined account list
- All qualified accounts that meet the “statement print” criteria:
  - *For doctor* – accounts by individual doctors in the practice
  - *On account list* – accounts which have been placed on a user defined account list
  - *From alphabet* – select accounts by part of the alphabet
  - *All* – the accounts selected by the system according to practice criteria

## Sorting Accounts

- **SELECT** *Sort selected accounts*, allows sorting by three variables (Figure 4). This is the order they will print.
  - *Last name*
  - *Position in the ageing list*
  - *Zip Code*

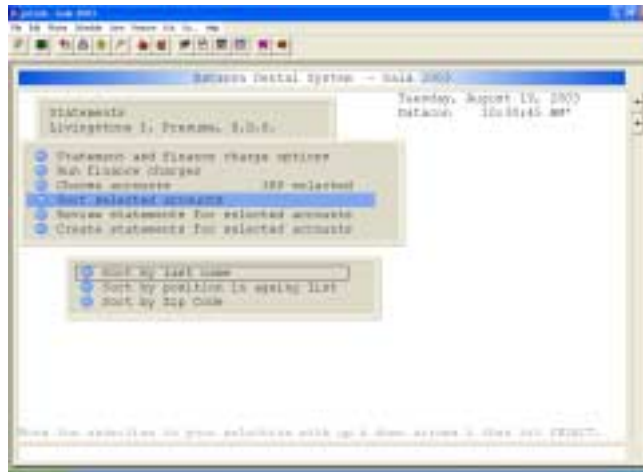


Figure 4: Statements – Sort Selected Accounts Menu

## Reviewing Statements

- **SELECT** Review statements for selected accounts. Choosing an account from this list allows you to review how the statement will look if you printed it. You can **LINE DELETE** accounts from this list if you do not want them to receive statements.
  - **SELECT** an account name and their statement will appear on the screen (Figure 5)
  - **SELECT** again to review the actual account, and add last minute statement notes

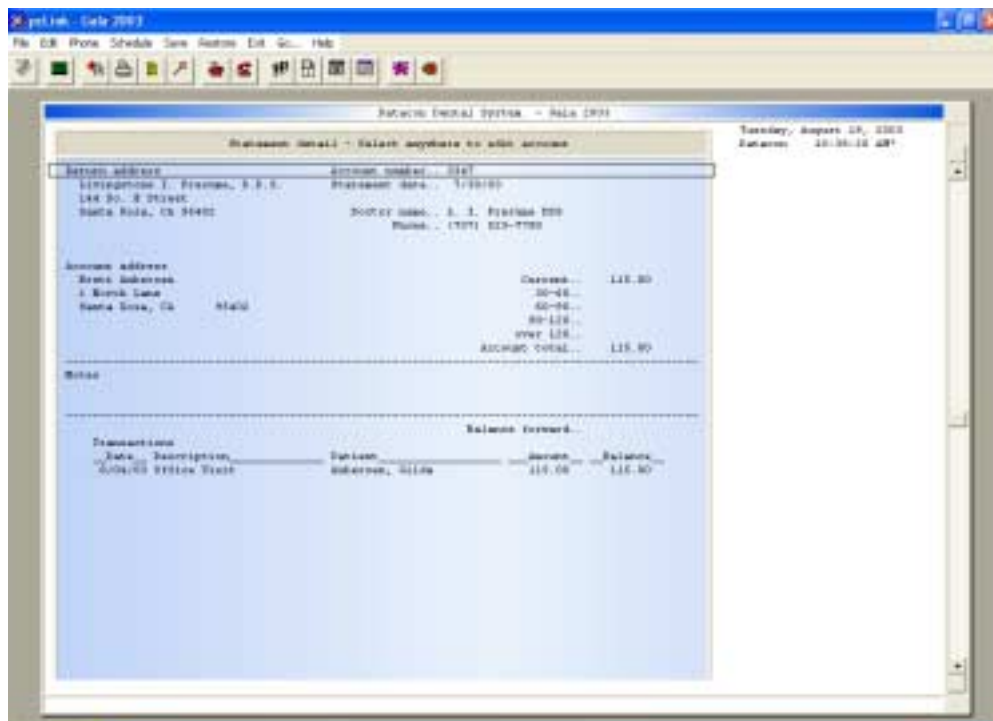


Figure 5: Statement – Account Statement Example

## Printing Statements

- **SELECT** *Create statements for selected accounts*

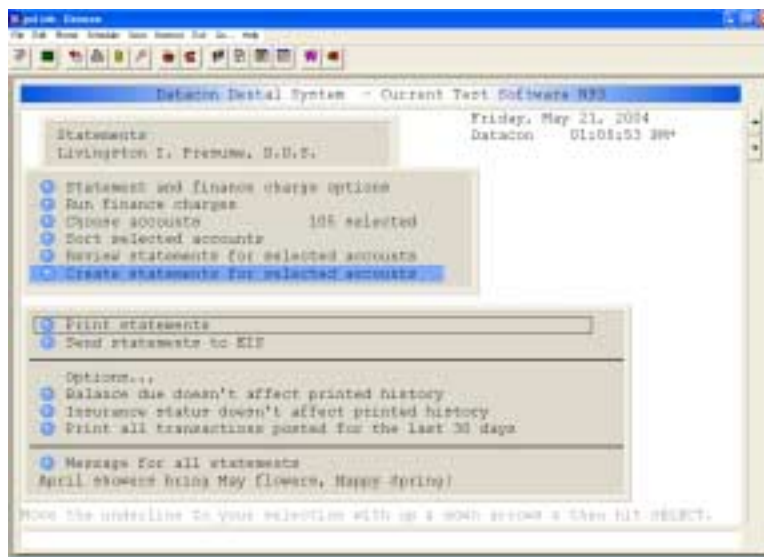


Figure 6: Print Statements Menu

## Printing Options

- **SELECT** *Balance due doesn't affect printed history* to change to *Include all transactions with a balance due*
- **SELECT** *Insurance status doesn't affect printed history* to change to *Include all transactions billed to insurance*
- **SELECT** *Print all transactions posted for the last 30 days* and type the number of days you want to print a statement for (up to 99 days) or blank out the number days to change to *The age of the transactions doesn't determine if it prints*

## Message for All Statements

- **SELECT** *Message for all statements* and type the message you want on all your statements

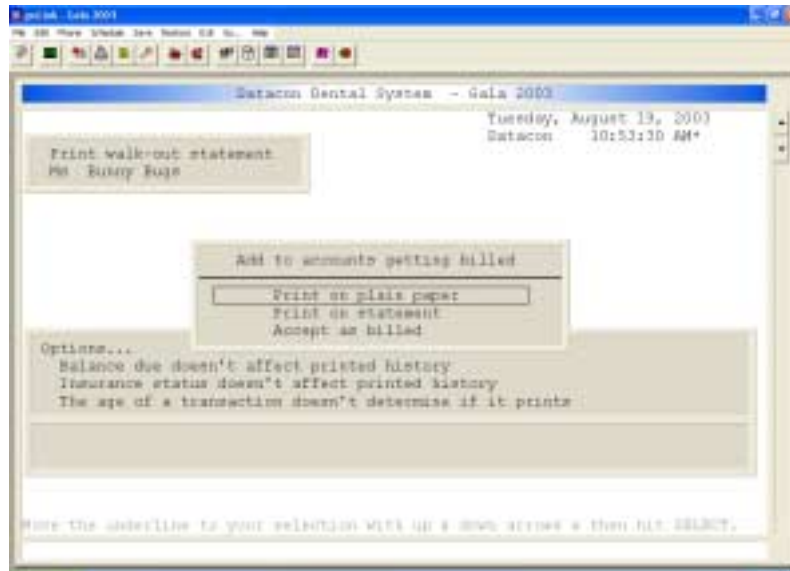
## Printing the Statements

- **SELECT** *Print statements*
- **SELECT** *Choose printer* and **SELECT** the printer you want
- Make sure your statements are in your printer!
- **SELECT** *Print statements*
- Answer "Y" to "Start at the beginning?" You will see the names of the accounts go by on your screen.
- When you are satisfied that the statements printed ok, **SELECT** *Accept statements*
  - You **MUST** accept statements!!

## Walkout Statements

- You can print a Walkout Statement directly from the *Account Information* screen.

- **SELECT** *Walkout statement* from the *Account information* screen



**Figure 7:** *Walkout Statement*

- **SELECT** *Print on plain paper* or *Print on statement*
- **SELECT** *Accept as billed*
  - Use this *Accept as billed* so when you print your monthly statements, if your *Statement options* are set not to reprint statements within a certain number of days, this account's statement will not print again.

### **Printing Options**

- **SELECT** *Balance due doesn't affect printed history* to change to *Include all transactions with a balance due*.
- **SELECT** *Insurance status doesn't affect printed history* to change to *Include all transactions billed to insurance*
- **SELECT** *The age of a transaction doesn't determine if it prints* to change to *Print all transactions for the last XX days*
- *Add to accounts getting billed* is an option that allows you to select an individual statement to be added to the list of statements to print later. This feature is especially handy when you want to delay billing until the insurance carrier has paid its portion but not wait until the following billing cycle.