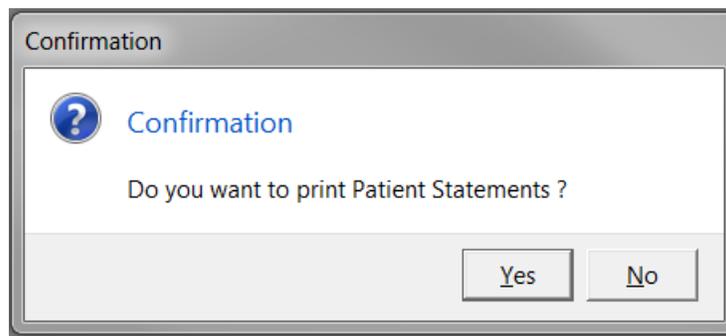# Statement Printing

Follow the steps to get to the statements options by going to Receivables>Statements. You can print Patient Statements or Insurance Statements.

The prompt will appear asking what sort of statement you wish to run.

If you wish to run Patient Statements select Yes. If you wish to run insurance statements select No. The next prompt will ask if you want to run Insurance Statements, where you can select Yes.


For either option, the following window will prompt you to either run through all patient/insurance statements or you can use the drop-down arrow to select a single patient/insurance company. Select Run once you have entered your criteria.

If you have more than one company listing in your Futura system, the following prompt will ask which company you wish to run statements for.
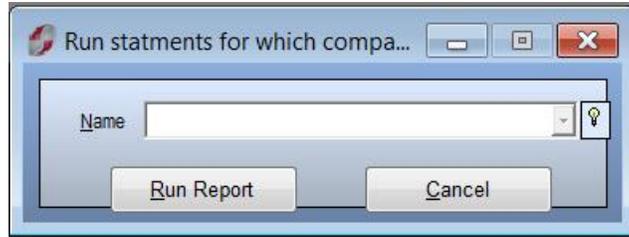
Similar to the previous prompt, this field can be left blank to run all companies in the database or a single company can be selected from the drop down menu. Once you've made your selection, hit the Run Report button.
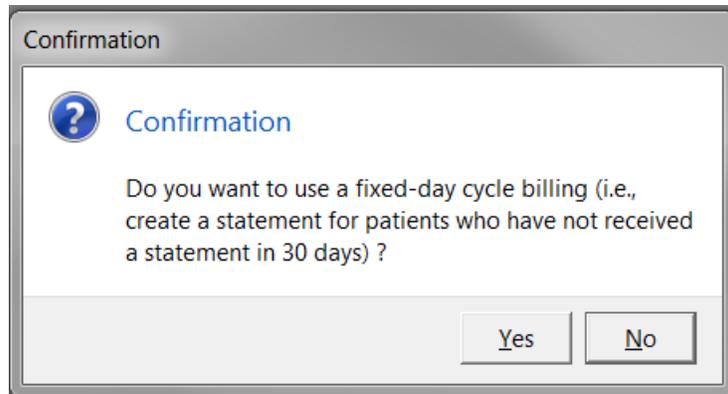

The following prompt will ask what type of billing cycle to use. Futura provides you with the option of running various stages of billing cycles. Many companies choose to use a billing cycle of 30 days to send out monthly statements. This means a statement will print for any patient/insurance that hasn't received a statement in 30 days or more. If you wish to use a billing cycle, click Yes and the next screen will allow you to set the number of days (Default is 30). If you want to print statements for all patients that owe money, regardless of the last time they got a statement, click No.
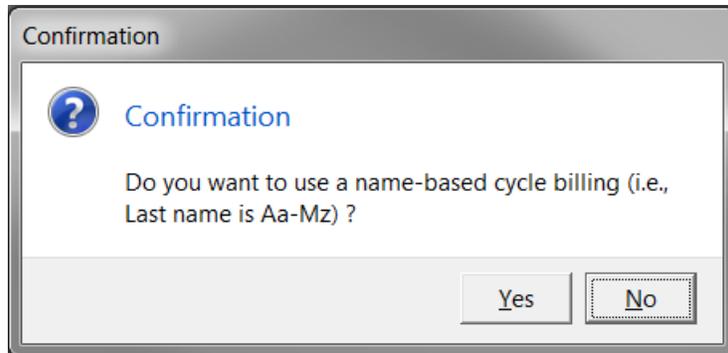
The next prompt will ask if you want to use a name-based billing cycle. This function allows you to run patient/insurance statements with names that fall within your criteria. For example, some companies like to run all patients with the last names A through M one week, and N through Z on another week. If running insurance statements for hospitals or SNFs, this may be a good option for running more than one at a time. If you do not wish to use this option select No to run the statements.

Select Yes to utilize this option.
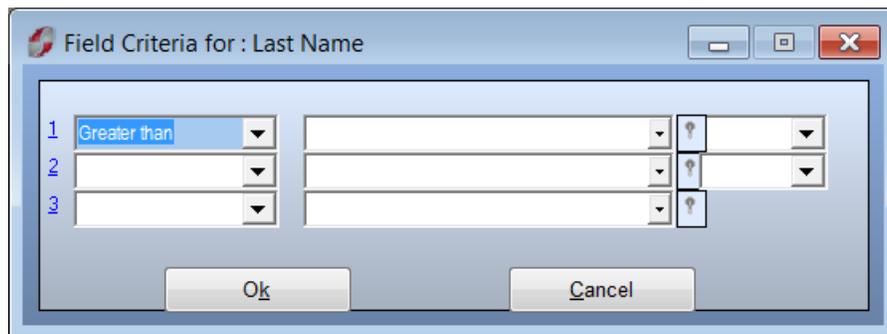
If you are familiar with running custom reports, this Field Criteria window should look familiar. Use the drop-down menu to select the parameters you wish to set. If you are not familiar with setting field criteria, please call support so we can assist you with this process. Once your parameters are set, select OK to run the statements.

Once the calculations have been made, a confirmation window will appear stating how many statements were found within the criteria settings. If you wish to print the statements select Yes.

*** Note: If you select No to printing statements, from this point on Futura has already calculated and applied a statement date to the patient or insurance. Running statements again will result in zero results found. If this is in error, you must contact technical support to run a utility that will remove those dates. ***

The report writing timer will appear at the top of the screen while compiling the statements. When this process is done, the familiar print preview screen will appear.

```
Test O&P Company                                  Patient
22051 US Highway 19N                 Account#   Portion Due      Date
Clearwater FL 33765                    95           70.61       05-15-15

                                     Payment type circle one:

                                     Card     Check

                                     Amount Enclosed $ _____




Please return this portion with your payment


_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _




SFPOS                   22051 US Highway 19N          Clearwater FL 33765
Billing Inquiries       (727)791-3332
Account# 95             Provided To                   Date 05-15-15
Referred by DR.
_____
Primary Ins: Noridian                      Filing Date: 04/08/08
Second Ins: Secondary Medicaid             Filing Date: 05/30/08
    DOS        INVC#     Description                        Total
    04-08-08    731      LO FLEX WO RIGID STAYS PR          70.61
```

The statements compiled can be reviewed within the print preview screen. Hit Esc to prompt for the print option.

*** Note: It is not recommended to make any changes or free type within the preview screen. This can cause changes to the formatting and cause the statements to print across several pages. ***

Common mistakes can include:

- Making changes in the print preview screen
- Selecting File>Print instead of hitting Esc to print
- Escaping, selecting No or aborting the statement process
- Parameters may be incorrectly set
- No statements exist for the time period selected

Changes can be made to the location and information that prints on the statement. For example, moving the mailing address to fit a specific window envelope or adding your company's logo are easy adjustments. Please contact Technical support with your request and we will be happy to assist you.

If you ever have any questions or concerns please feel free to contact support at 1-800-840-6057 and selecting option 1 or emailing Futura.Support@oandp.com.