

MyPractice Clinical Systems

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Clinical Notes

How to print statement/transactions in MyPractice

1. Open a patient/company account.



2. Click on statement tab:

Appointments Account - Proce	are X									
	Account Holder : Pro	ocare 🛛 🚏 Integrity 🛃 Retota	I 🔜 Merge 🝺 Refre	esh 관 Another 🔂 Next 🔰 Finish 🗸						
Point of Sale Account Pay	Point of Sale Account Payment Statement									
₹ Statement View	Statement View									
Closing Date 20/12/20	Current Month 3 Months All 22/04/2009	Please pay within 7 days								
			Preview Print							
Statement	Opening Balance	Message	Print							

- 3. Select a Statement Date from the drop-down menu. This can be retrospective (there is no need for end of month or end of period accounts processing).
- Select the period that you want the statement to cover. The default view (Current Month) displays an opening balance for items older than one month and lists details for the rest. You can choose to see details for the last [3 months], [ALL] dates or from a specified date using the drop-down menu.
- 5. Click on Vew tab it shows you all the options:

Point of Sale Accourt	nt Paymen	t Stateme	ent									
The second se												
	6	al a	0	<u>.</u>			7	2	X			
Itemised Allocations Invoices	Credits	Corrections	Reversals	Bad Debts	Paid	Group By	Row Filter	Print Table	Excel			
Details Adjustments Status View Export												
DataTime / V Invoice / V Provider V Description V Patient V SubAmount V Amount V												

If you wish to see the individual items within the invoices (patient and service details) click Itemised Invoices (it should be selected by default). If you wish to see details of how payments have been allocated, click Allocations. If you wish to include credits, reversals or corrections, click the bottons as appropriate.

6. You can export you statement as excel

Point of Sale Account Payment Statement											
Statement View											
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Itemised A Invoices	llocations	Credits	Corrections	Reversals	Bad Debts	Paid	Group By	Row Filter	Print Table	Excel	
Details Adjustments					Status		View		Export		

7. If you want to print the statement, click on Print button. Or click on Preview button to preview the statement.

Enter any Message that you want to appear on the statement.

₹ Statement View		А
Closing Date 20/12/20	Current Month 3 Months All 22/04/2009	thin 7 days Preview Print
Statement	Opening Balance M	essage Print

Here is the preview of the statement:

STATEMENT

My Doc P O Box 52 Glads Parnell Central A	tor Ltd 56232 tone Road)23								
Phone: 0 GST: 8	Phone: 09 309 2153 Fax: 09 309 2162 GST: 80-145-247									
	Proca P O B 110 S Auckl	re OX 105 346 tanley St and	5		4-Dec-2010					
Date	Service Item				Amount					
1-Dec-2010	Opening Bala	ance			16,966.04					
2-Dec-2010	Invoice No. 1	0094: by AKP			56.22					
	Diabetes ann	ual review: Ri	ta Fox	56.	22					
Current 766.65	30 days 557,11	60 days 55.00	90+ days 17,393,50	unallocated \$1.855.00	Total Amount Due \$ 17.022.26					

Please pay within 7 days