

Terry Hill of Lilly Systems & Solutions (e-mail [terry@lillysystems.com](mailto:terry@lillysystems.com))

Setting up the "Custom Dunning Messages" for OpenEMR. Go to Administration=>Globals You will see a tab on the right hand side of the screen called "Statement". The Option for "Use Custom Statement" allows the printing of the office visit codes instead of the "Office Visit" that normally prints. These 992XX codes will need to be in the code database in order for this to work. Checking the option "Use Custom Dunning Messages" will enable the dunning messages to appear on the statements.

The screenshot shows the OpenEMR web interface. The browser address bar displays `localhost/openemr/interface/main/main_screen.php?auth=login&site=default`. The page title is "Edit Global Settings". A navigation bar at the top contains tabs for various settings: Appearance, Locale, Features, Documents, Calendar, Security, Notifications, CDR, Logging, Miscellaneous, Portal, Connectors, Rx, PDF, Billing, and Statement. The "Statement" tab is currently selected. Below the tabs, there are two checked checkboxes: "Use Custom Statement" and "Use Custom Dunning Messages". Below these are five rows of settings, each consisting of a label, a numeric input field, and a text input field:

Use Custom Statement	<input checked="" type="checkbox"/>	
Use Custom Dunning Messages	<input checked="" type="checkbox"/>	
Number of days before showing first account message	<input type="text" value="30"/>	
First account message		<input type="text" value="Please send your payment"/>
Number of days before showing second account message	<input type="text" value="60"/>	
Second account message		<input type="text" value="To ensure your good credit Please send your Payment today"/>
Number of days before showing third account message	<input type="text" value="90"/>	
Third account message		<input type="text" value="To avoid possible collections Please send your payment today"/>
Number of days before showing fourth account message	<input type="text" value="120"/>	
Fourth account message		<input type="text" value="This will go to collections on the 15th of next month"/>
Number of days before showing fifth account message	<input type="text" value="121"/>	
Fifth account message		<input type="text" value="This account is in collections Please contact the collections agen"/>

At the bottom left of the settings area, there is a "Save" button.

Figure 1

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The number of days before showing the message and the content of the message are completely up to the user. The first four options are setup in the program to check if the age date is less than or equal to that number. The fifth message is setup in the program check if the age date is greater than or equal to that number.

The screenshot shows the OpenEMR interface with the following details:

- Browser: OpenEMR, URL: localhost/openemr/interface/main/main\_screen.php?auth=login&site=default
- Page Title: NEW PATIENT
- Navigation: Home | Manual | Logout
- User: Terry Hill
- Section: Edit Global Settings
- Tab: Statement
- Options:
  - Use Custom Statement:
  - Use Custom Dunning Messages:
  - Number of days before showing first account message: 30
  - First account message: Please send your payment
  - Number of days before showing second account message: 60
  - Second account message: To ensure your good credit Please send your Payment today
  - Number of days before showing third account message: 90
  - Third account message: To avoid possible collections Please send your payment today
  - Number of days before showing fourth account message: 120
  - Fourth account message: This will go to collections on the 15th of next month
  - Number of days before showing fifth account message: 121
  - Fifth account message: This account is in collections Please contact the collections agen
- Buttons: Save

Figure 2

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The dunning message will print as the last line of the statement detail. I have also included the ability to print the "Billing Message" on the statement program that I have included with this enhancement.

Lilly Systems & Solutions  
115 Any Street  
Ant Town, TN, 37748

Jane Doe  
Chart Number: 1  
Insurance information on file  
Total amount due: 470.00

2014-12-28

**ADDRESSEE**  
Jane Doe  
123 Any Street  
Anytown, TN 36655

**REMIT TO**  
Lilly Systems & Solutions  
115 Any Street  
Ant Town, TN, 37748

If paying by VISA/MC/AMEX/Dis

Card \_\_\_\_\_ Exp \_\_\_\_\_ Signature \_\_\_\_\_  
Return above part with your payment

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STATEMENT SUMMARY

Visit Date	Description	Amount
2014-08-08	Established Patient Detailed	75.00
	Adj 2014-10-08: Ins adjust Ins1 BCBS	-25.00
	Paid 2014-10-08: BCBS	-50.00
	Paid 2014-10-13: Pt Paid	-35.00
	Paid 2014-10-13:	35.00
2014-08-08	Non-emergency transportation:	300.00
	Paid 2014-10-08:	-275.00
	Paid 2014-10-13: 475	-25.00
2014-08-08	Pharmacy dispensing fee for in	225.00
	Adj 2014-10-08: Ins adjust Ins1 BCBS	-100.00
	Paid 2014-10-08: 7779986 BCBS	-125.00
2014-08-08	Power wheelchair, group 2 heav	175.00
	Adj 2014-10-08: Ins adjust Ins1 BCBS	-75.00
	Paid 2014-10-08: BCBS	-100.00
2014-08-08	Medical nutrition therapy, rea	975.00
	Adj 2014-10-08: Ins adjust Ins2 Anetna	-375.00
	Paid 2014-10-08: 7779986 BCBS	-105.00
	Paid 2014-10-08: 123451 Anetna	-250.00
	Paid 2014-10-13: 475	-55.00
	Paid 2014-10-13:	-90.00
2014-08-08	Administration of influenza vi	27.50
	Paid 2014-10-13: 475	-27.50
2014-08-08	DESTRUCTION BY NEUROLYTIC AGEN	120.00
2014-08-08	DESTRUCTION BY NEUROLYTIC AGEN	250.00

Yep this is where the billing note goes  
This account is in collections Please contact the collections agency to send  
payment.

Figure 3