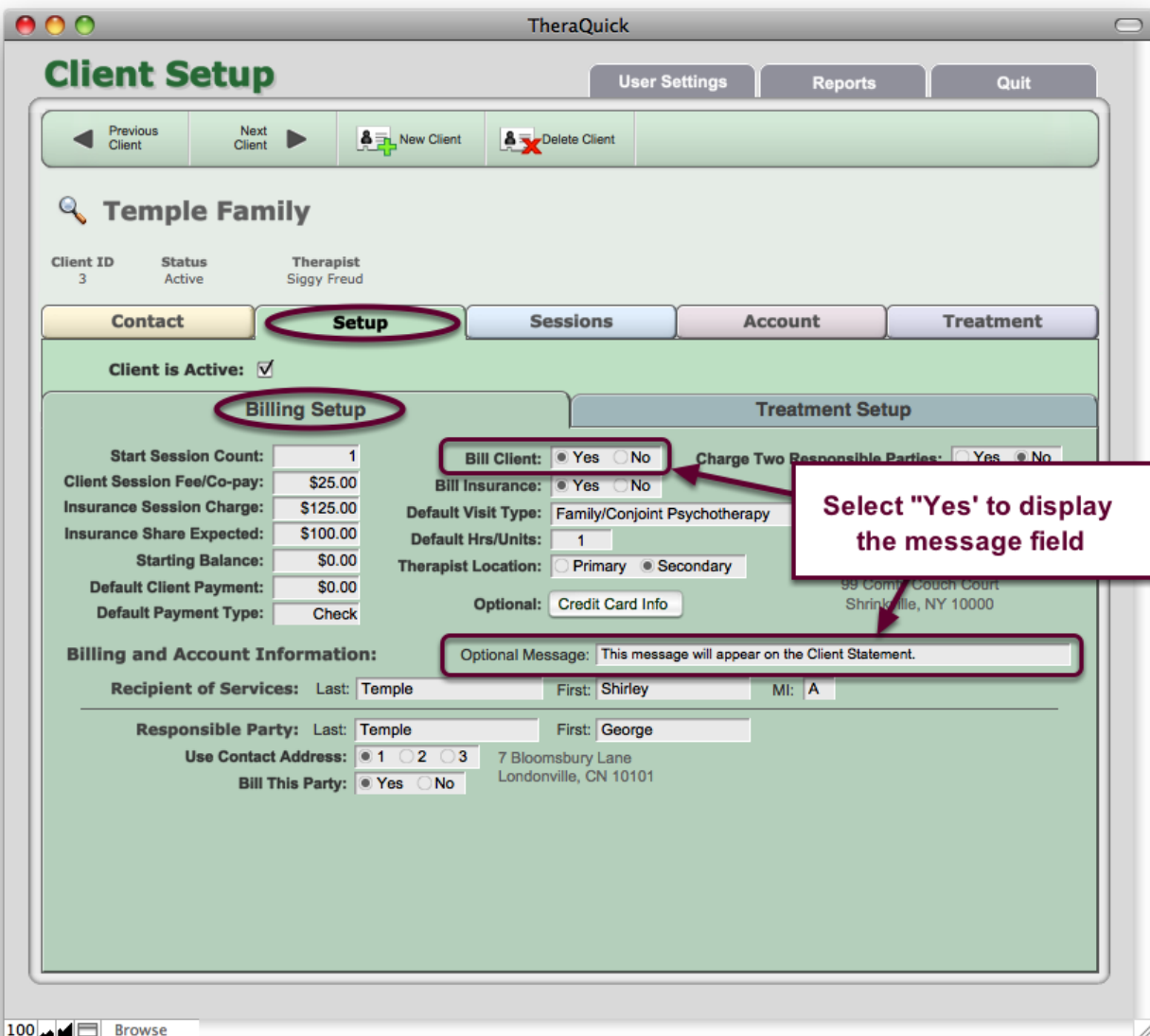


# Using Therapist and Client Comments on the Client Billing Statement

How to add a Therapist or Client-specific comment to the client billing statement (including how to add the comments to customized layouts in the TheraQuick Reporter)


**To place a Client-specific comment on the billing statement, navigate to the Client Billing Setup**



Navigate to the Client Activity > Setup > Billing Setup layout. Be sure that "Bill Client" is set to "Yes." The new "Optional Message" field will appear. Enter the message you wish to add to the Client billing statement. (More than one line of text can be entered, and it will be displayed when you click in the field. It will also display properly on the Client statement.)

The Client-specific message will appear only on that client's billing statement

Billing Statement



**Dr. Sigmund Freud**  
**Shrink-N-Think Analysis**  
 99 Comfy Couch Court  
 Shrinkville, NY 10000  
 866-111-2222

**Statement**  
 1 September 2009

Responsible party:  
**George Temple**  
 7 Bloomsbury Lane  
 Londonville, CN 10101

Services provided to:  
**Shirley Temple**

**\$100.00**  
Total Balance Due

Billing Period:  
 1 Aug 2009  
 to 31 Aug 2009

Date	Description	Note	Charge	Credit	Balance
Previous Balance:					\$100.00
3 Aug 09	Payment			\$100.00	\$0.00
5 Aug 09	Family/Conjoint Psychotherapy		\$25.00		\$25.00
12 Aug 09	Family/Conjoint Psychotherapy		\$25.00		\$50.00
19 Aug 09	Family/Conjoint Psychotherapy		\$25.00		\$75.00
26 Aug 09	Family/Conjoint Psychotherapy		\$25.00		\$100.00
<b>New Balance:</b>					<b>\$100.00</b>

Notes: LC = Late Cancel, MS = Missed Session

Balance is payable upon receipt.  
 Please make checks payable to:  
**Sigismund Schlomo Freud**

This message will appear on the Client Statement.

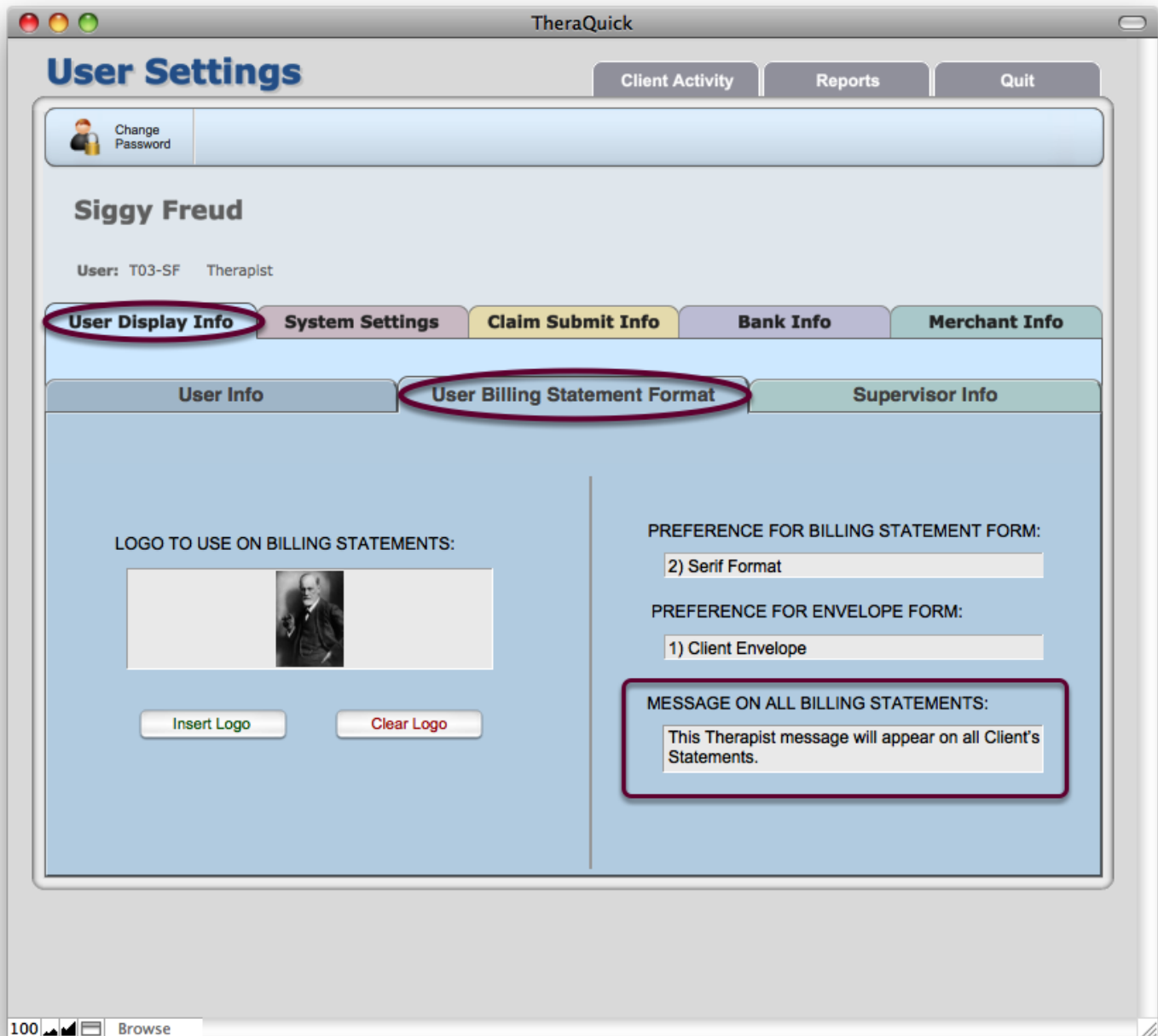
**Dr. Sigmund Freud**  
 Psychoanalyst PSX9999

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Preview


Billing statements for that client will contain the message entered in that Client's Billing Setup.

To place a comment for all Clients for a Therapist, navigate to the User Billing Statement Format layout



Navigate to User Settings > User Display Info > User Billing Statement Format. Enter the message you want to appear on all (that Therapist's) Client statements in the "Message on All Billing Statements" field.

**The Therapist message will appear on a Client's statements**



**Dr. Sigmund Freud**  
**Shrink-N-Think Analysis**  
 99 Comfy Couch Court  
 Shrinkville, NY 10000  
 866-111-2222

Responsible party:  
**George Temple**  
 7 Bloomsbury Lane  
 Londonville, CN 10101

Services provided to:  
**Shirley Temple**

**Statement**  
 1 September 2009

**\$100.00**  
Total Balance Due

Billing Period:  
 1 Aug 2009  
 to 31 Aug 2009

Date	Description	Note	Charge	Credit	Balance
Previous Balance:					\$100.00
3 Aug 09	Payment			\$100.00	\$0.00
5 Aug 09	Family/Conjoint Psychotherapy		\$25.00		\$25.00
12 Aug 09	Family/Conjoint Psychotherapy		\$25.00		\$50.00
19 Aug 09	Family/Conjoint Psychotherapy		\$25.00		\$75.00
26 Aug 09	Family/Conjoint Psychotherapy		\$25.00		\$100.00
<b>New Balance:</b>					<b>\$100.00</b>

Notes: LC = Late Cancel, MS = Missed Session

Balance is payable upon receipt.  
 Please make checks payable to:  
**Sigismund Schlomo Freud**

This Therapist message will appear on all Client's Statements.

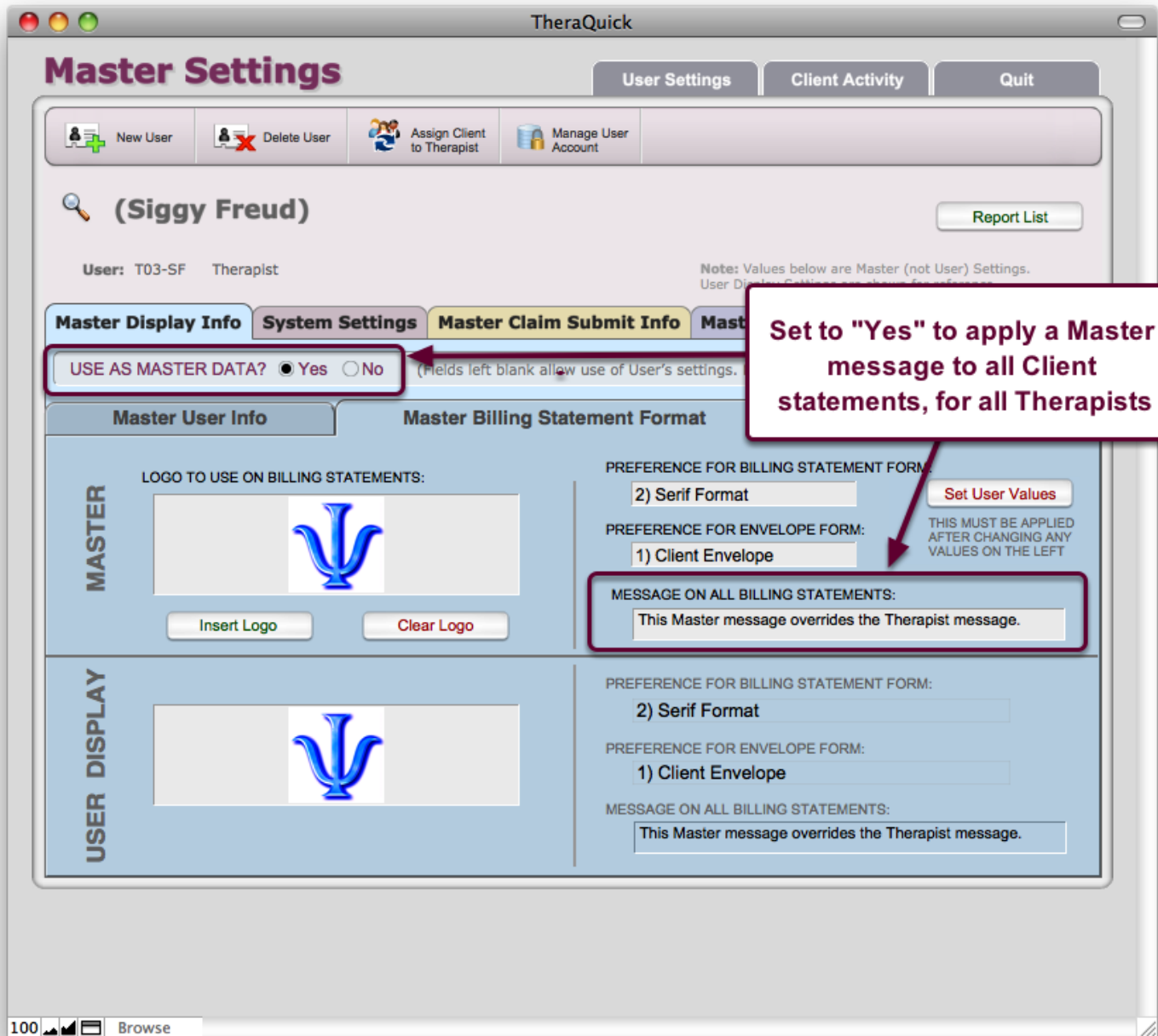
This message will appear on the Client Statement.

**Dr. Sigmund Freud**  
 Psychoanalyst PSX9999

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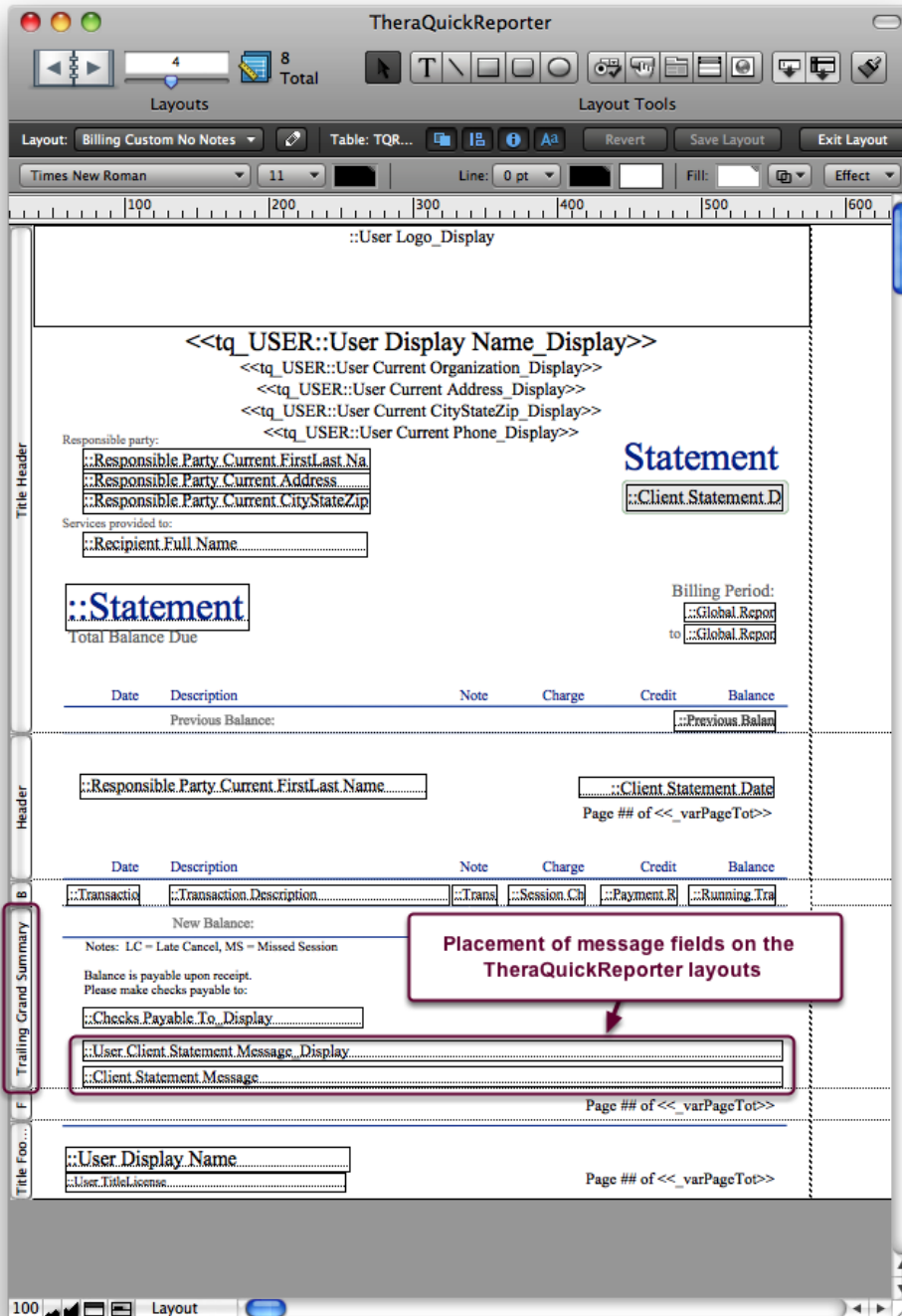
The Therapist message will appear on a Client statements for Clients of that Therapist.

In the TheraQuick Team edition, a Master message can be used.



Navigate to the Master Settings > Master Display Info, Master Billing Statement Format. When a Master message is entered and "Use as Master Data" is set to "Yes," this message overrides all Therapist's messages and will appear on all Client's statements.

**Placement of comment fields on the TheraQuick Reporter layouts**



If you use the TheraQuick Reporter and you wish to use Client or Therapist comments, you can place the fields **tq\_User::User Client Statement Message\_Display** and **tq\_Client::Client Statement Message** onto your layout, in the Trailing Grand Summary part. If you have not made any changes to your TheraQuick Reporter layouts, you can use the new TheraQuickReporter.fp7 file distributed with the TheraQuick 1.8.2 update. Alternatively, you can copy and paste these fields



from the layouts in the new file into your own TheraQuickReporter.fp7 file. Note: Be sure to place these fields on ALL layouts within a group.