DN Options

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he **Edit Settings** button allows you to enable, disable or edit settings to different types of statements.

1. Select **Customer Setup** > **Statements**.
2. Use the "**Select a Practice to Manage Statement Configuration for"** drop-down menu to select the desired practice.

   ⚠ If you have multiple practices, these settings must be configured under each participating practice.

3. Under the **Automation Statement Generation** table, click the **Edit Settings** button.
4. Use the **checkbox(es)** to **enable** or **disable** the **types of statements** you would like to use.
5. Configure the settings associated with the Final Demand Notice (FDN) type.

   🪄 When enabling Statement automation, statements will not be sent until a template has been configured. Please reference our Edit Statement Automation Templates Help Article for more information.

   1. **Send statements electronically?** Set this option to **Yes** if you want to send electronic statements (email or text) to patients.
   2. **Send statements on paper after the maximum number of electronic statements have been sent?** Set this option to **Yes**, and choose the number of days you want to send the paper statement after the maximum number of electronic statements is sent.
   3. **Statement Options**:
      1. **Statement Separation**: Select how statements should be separated.
         1. **Send one statement for all charges**: Select this option to send a combined statement for all charges on the account.
         2. **Send separate statements for charges per provider**: Select this option to send separate statements for charges associated with different **Providers**.
         3. **Send separate statements for charges per practice**: Select this option to send separat statements for charges associated with different **Practice**.
         4. **Send separate statements for charges per claim**: Select this option to send separate

statements for charges separated by **Claim**.

> 🪄 Selecting the option to "**Send separate statements for charges per claim**" will include any account debits (debits not attached to a claim) as their own statement.

2. **Automatically send FDN to patient after the maximum number of statements (both electronic and paper) have been sent?** Set this option to **Yes** if you want to send an FDN to patient after the maximum number of statements have been sent.

4. **Electronic Statements**:

    1. **Minimum amount required for sending electronic statements**: Select the minimum threshold for sending electronic statements. For example, enter "$5.00" if you wish to have patients with a balance greater than or equal to $5.00 receive an electronic statement.

    2. **Choose allowed methods to send electronic statements**: Select how the electronic statements should be sent, Email Only or Email and Text (email will be the first option).

    3. **Send Email Replies to**: Select where you want email replies to be sent to.

    4. **Choose when to send electronic statements**: Select the day of the week and the time of the day to sent out the electronic statements and how long to wait between statements.

        > 🪄 **Our recommended settings** were created from research that indicates that response rates are the highest in the late morning or mid-afternoon on Tuesdays and Fridays.

    5. **Number of electronic statements to send unless statement balance paid in full** Enter the number of times a statement should be sent if unpaid.

        > 🪄 Set this field to '0' to continue sending statements until the patient pays the full balance.

5. **Paper Statements**:

    1.

    2. **Minimum amount required for sending Statements and FDNs**: Select the minimum threshold for sending paper statements. For example, enter "$5.00" if you wish to have patients with a balance greater than or equal to $5.00 receive a statement.

    3. **Frequency for sending paper statements and FDNs**: Select the number of days to send a paper statement after any applicable electronic statements have been sent.

4. **Number of paper statements to send unless statement balance paid in full** Enter the number of times a paper statement should be sent if unpaid.

   > Set this field to '0' to continue sending statements until the patient pays the full balance.

6. **Select the Patient Account Types to send Statements to** Select All Account Types or identify specific patient account types (eg., Self Pay, Payment Plan, Collection) that should receive a statement.

6. Click **Save**.

> **Important Note**: Modifying the date or number of days for a statement will cause **ALL** charges that are set to "**Balance Due Patient**" to be printed and mailed again. CollaborateMD is not responsible for duplicate statements in the event the date is modified.