:dit Statement Automation Templates

:t Modified on 10/28/2025 4:40 pm EDT

:onfigure Electronic Statement Settings

Important Note: You must have the **In-App Credit Card processing** and the **Patient Payment Portal** features enabled and configured in order to use electronic statements. For more information on turning these services on, please visit our Manage In-Application Credit Card Processing and Manage your Patient Payment Portal Help Articles.

1. Select **Customer Setup** > **Statements**.
2. Use the **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 Templates** button.
4. Use the drop-down menu to select the**Statement Type** to configure:

   ## Emailed Electronic Statements

   1. Review or edit your email template fields (email Subject and body).

      Use the **Righ-click** options to select and add the available variables to the template.**The [Payment Link] is a required field and will not save if removed from the template.**

   2. Use the date format drop-down to select your date format.
   3. Under **Electronic Statement Template (used for all practices)**review or edit your **Important Message** and your **Contact Us** fields. This General information will be shown on the payment portal's patient statement view.
      1. Enter a personalized **Message To Patients** that will be shown within the bottom portion of their online bill.
      2. Select whether or not you want to show your phone contact information, email contact information, or both by selecting them and entering the required data.
      3. **Optional**: Click **Save and Show Demo** to view the **important message** and the **contact us**

fields in the payment portal.

4. Click the **General tab** from the side panel to access general settings that apply to all statements.

    1. Select the **credit cards accepted** by this practice.

    > Don't accept credit card payments by mail? Make sure all credit card boxes are unchecked.

    2. **Show Due Date**: Check this option to show the due date of **Upon Receipt** on the statement.

    3. **Do not include account credits**: Check this box to remove credits on the patient's account from being included in the calculation of the Balance Due on the statement and from being listed within the detailed line items.

    4. **Summarize charges**: Check this option to group multiple charges associated with one claim. The code and description that appear on the statement are associated with the first charge on the claim.

    5. **Show paid charges**: Check this option to include all charges, with associated payments and/or adjustments, associated with the patient even if there is no outstanding balance on the charges.

    6. **Show units in charge description**: Check this option to show the number of units used on each line item charge. The number of units will be displayed next to the charge description on your patient's statements.

    7. **Increment Statements times Printed when sending FDN**: Check this box if you wish to have FDNs be counted towards the patient's statement sent count.

    8. **Use separate address for Pay-To**: Check the box and populate the required information to receive payments at a different address than the practice address.

    9. **Use separate address for return**: Populate the required information to have undelivered statements returned to a different address than the practice address.

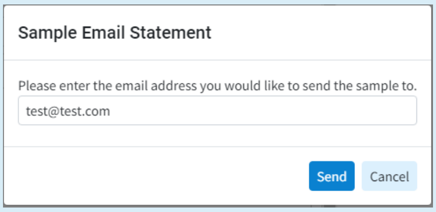
    10. **Use the Revenue code description for charges on institutional claims**: Check this option to print the revenue code description instead of the procedure code description on institutional claims.

5. Click the **Electronic Statement Options tab** from the side panel to access **Charge Breakdown** options:

    1. **Summarized details for each charge**: Enable this option to send a summary detail of charges.

    2. **Detailed activity listing**: Enable this option to send a detailed listing of charges.

Click **Send Sample** and enter a test email to receive a sample of your electronic Statement.



SMS Text Electronic Statements

1. Review or edit your text message template.

   Use the **Righ-click** options to select and add the available variables to the template. **The [Payment Link] is a required field and will not save if removed from the template.**

2. Use the date format drop-down to select your date format.

3. Under **Electronic Statement Template (used for all practices)** review or edit your **Important Message** and your **Contact Us** fields. This General information will be shown on the payment portal's patient statement view.

   1. Enter a personalized **Message To Patients** that will be shown within the bottom portion of their online bill.
   2. Select whether or not you want to show your phone contact information, email contact information, or both by selecting them and entering the required data.
   3. **Optional**: Click **Save and Show Demo** to view the **important message** and the **contact us** fields in the payment portal.

4. Click the **General tab** from the side panel to access general settings that apply to all statements.

   1. Select the **credit cards accepted** by this practice.

      Don't accept credit card payments by mail? Make sure all credit card boxes are unchecked.

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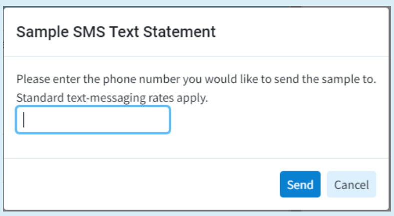
    1. **Summarized details for each charge**: Enable this option to send a summary detai of charges.
    2. **Detailed activity listing**: Enable this option to send a detailed listing of charges.

    Click **Send Sample** and enter a test phone number to receive a sample of your electronic Statement.

6. Click **Save**.

⚠ Want to revert back to the default message? Click**Reset to Default.**