Payment Plan Options

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If using Payment Plans, please be aware that statements are generated when the charge status is set to "***Balance Due Patient"*** or the set number of days prior to installment due dates. Once changed, the statement will be sent based on the automation options you've selected.

The **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 Payment Plans statement type.
   1. **Minimum amount required for sending Payment Plan statement** Enter the minimum balance that must be met in order for a payment plan statement to be generated.
   2. **Send Payment Plan statements when automatic payments have been set up for the payment plan?** Set this option to **Yes** if you want to send a payment plan statement after an automatic payment has been set up for the payment plan.
   3. **Send Payment Plan statements electronically?** Set this option to **Yes** if you want to send electronic payment plan statements (email or text) to patients.
   4. **Send Payment Plan statements on paper before the installment is due?** Set this option to **Yes** if you want to send a paper payment plan statement before its due date, and if so, select the number of days before the due date to send it.
   5. **Resend Payment Plan statement after installment due date if not paid in full?** Select this option if you want to send a paper payment plan statement after the due date if not paid in full.
   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.