

Send Electronic Patient Statements

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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.

*Please note that emailed statements are sent to the Payment Portal email address (if present) or the patient's email address. The patient's "Mail Statement To" option is only used for physically mailed (paper) statements.

Follow the steps below to send an electronic statement.

1. Select **Patient > Patient**.
2. Use the **Search** field to search through your patients.

 Place a check in the "**Include inactive patients**" box to include inactive patients in your search results.

3. Select the **Patient**.
 4. Click on the **More** button found at the top of the page.
 5. Select **Send Electronic Statement**.
 6. Verify the email/text option that displays in the pop-up, and click **Continue**.
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