Manage Manual Electronic Statements

t Modified on 04/10/2024 11:43 am EDT

Manual Electronic Statements allow you to send statements electronically in a batch instead of printing an mailing them out to patients, reducing your carbon footprint. Send statements out in a timely manner via mail or text (SMS) messaging.

---

f you're the Auth Rep, follow the steps below to enable, configure, or disable Manual Electronic Statement

1. Select **Account Administration** > **Services**.
2. Click the **button** next to Manual Electronic Statements.
3. The ***Enable Manual Electronic Statements*** box **enables or disables this service.**

   > The electronic statement templates must be edited in the statements section under **User Print Statements**. Automated Electronic Statements can be configured in the Statements screen under Automatic Statement Generation. Take a look at our Statement Configuration Help Article for more info.

4. Click Enable Manual Electronic Statements

> **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.
