Configure Statement Automation Templates

Last Modified on 11/24/2025 12:35 pm EST

Configure Automated Paper Statement Template

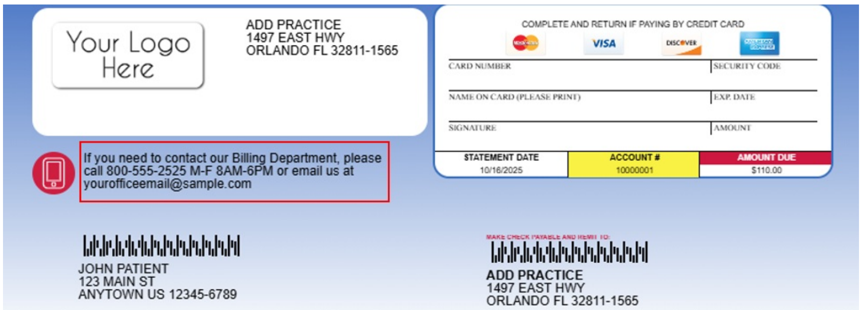
⚠ If automated statements were enabled and configured before the statement vendor change, please note that you must configure/verify your new statement templates. When you open the new templates, all required fields will already be copied over and populated. However, you still need to review (steps 1-5) and save the templates. It is important that you do this for all your practices, as statements will not be sent out until the templates have been reviewed and saved.

Follow the steps below to configure the Automated Statement Template.

1. Select **Customer Setup** > **Statements**.
2. Use the ***Select a Practice to Manage Statement Configuration for*** drop-down menu to choose the desired practice.
3. Under the "*Automation Statement Generation*" table, click **Edit Templates**.

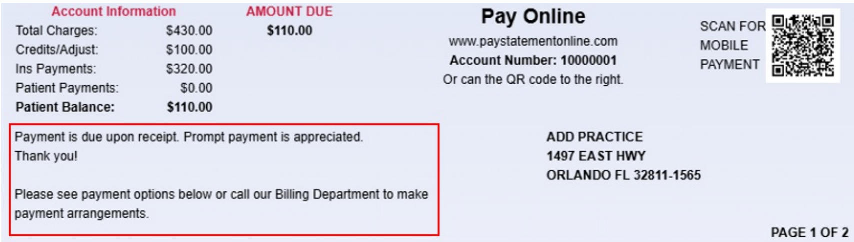
   To configure the statement template, it must first be enabled within the Statement Automation Settings. Visit our Statement Options Help Article for more information on enabling automated statement generation.

4. Use the drop-down menu to select the **Paper Statement** option to configure.
5. Place a check in the **Highlight editable fields** box to show all of the fields that you are able to edit.
6. **Configure your Statement Design**:
    1. Optional: **Add A Logo** to your statement.
        1. Click the **Your Logo Here** icon, then click **Upload** to select a logo from your computer.
        2. Adjust the logo.
        3. Click **Done**.
    2. Enter any applicable phone message in the top-left of the statement, below the address.



3. Enter any applicable **Important Message**.

> This field is located on the bottom left, below the Account Information box, if the Payment Portal is enabled for the customer. If the Payment Portal is not enabled, it is on the bottom right, to the right of the AMOUNT DUE box.



4. Enter any applicable **Insurance Information** message under the "*Change of address or health insurance information*" on page 2 (If no message is entered, the "Insurance Information" header w not print).

7. **Configure Your General Template Settings**:

   1. Click the **General tab** from the side panel to access general settings that apply to automated & user-print statements.

      1. Select the **credit cards accepted** by this practice by checking the box(es).

         > 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 hav FDNs be counted towards the patient's statement sent count.

    8. **Use separate address for Pay-To**:

        - **Statement Pay-To address**: 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**:

        - **Statement Return address**: 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.

8. **Configure Your Paper Statement Options**:

    1. Click the **Paper Statement Options tab** from the side panel to access paper statement settings that apply to automated & user-print statements.

        1. **Customize the Important Message:**

            1. **Always send the same important message:** Enable this option to always send the sam important/patient charge message.

            2. **Use charge age to set the important message:** Enable this option to edit the message based on how old the balance is (e.g., 0-30 days, 31 to 60 days, 61 to 90 days, over 90 days).

            3. **Use number of statements sent to set the important message:** Enable this option to edit the message based on how may statements have been sent (e.g., Sent 1 Time, Sen 2 Times, Sent 3 Times).

            4. **Use patient comment (if exists) in place of the important message:** Enable this option to use the patient comments instead of the patient charge message.

            5. **Show the Prompt Payment Discount information (if applicable):** When enabled, the discounted amount will be shown as the AMOUNT YOU OWE and the Due Date will

reflect the last date that the discount is applicable.

2. **Set your Charge Breakdown:**

    1. **Summarized:** Select this statement layout to show each charge on a single line. This lir displays the charge information, charge amount, total insurance payments, total patient payments, total adjustments/discounts, and the amount you owe.

Date	Description	Total Charges	Insurance Payments	Adjustments	Patient Payments	Balance
	Patient: JOHN PATIENT \ Account: 10000001					
09/16/2025	OFFICE VISIT	$400.00	$300.00	$0.00	$0.00	$0.00
09/16/2025	FLU SHOT	$30.00	$20.00	$0.00	$0.00	$10.00

    2. **Detailed Activity:** Select this statement layout to show one line for each charge, payment, adjustment, and info line.

Date	Description	Charges	Payments	Adjustments	Balance
	Patient: JOHN PATIENT \ Account: 10000001				
09/16/2025	**OFFICE VISIT**	**$400.00**	**$200.00**	**$100.00**	**$100.00**
10/09/2025	PAYMENT BY AETNA		-$50.00		
10/09/2025	ADJUSTMENT BY AETNA			$0.00	
10/09/2025	PAYMENT BY AETNA		-$150.00		
10/09/2025	ADJUSTMENT BY AETNA			-$100.00	
10/09/2025	DENIED BY AETNA		$0.00		

9. Click **Save**.

Configure Automated Payment Plan Statement Template

Follow the steps below to configure the Automated Payment Plan Statement Template.

1. Select **Customer Setup** > **Statements**.
2. Use the ***Select a Practice to Manage Statement Configuration for*** drop-down menu to choose the desirec practice.
3. Under the "*Automation Statement Generation*" table, click **Edit Templates**.

> To configure the payment plan statement template, it must first be enabled within the Statement Automation Settings. Visit our Payment Plan Options Help Article for more information on enabling automated payment plan generation.

4. Use the drop-down menu to select the **Payment Plan Statement** option to configure.

5. Place a check in the **Highlight editable fields** box to show all of the fields that you are able to edit.

6. **Configure your Payment Plan Statement Design:**

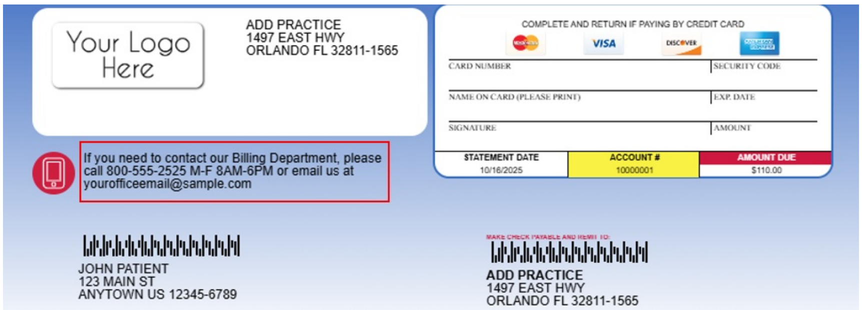
    1. Optional: **Add A Logo** to your statement.

        1. Click the **Your Logo Here** icon, then click **Upload** to select a logo from your computer.

        2. Adjust the logo.

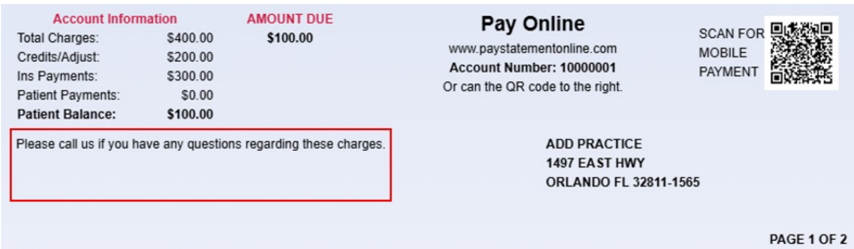
        3. Click **Done**.

    2. Enter any applicable phone message in the top-left of the statement, below the address.



    3. Enter any applicable **Patient Charge (Important) Message**.

    This field is located on the bottom left, below the Account Information box, if the Payment Portal is enabled for the customer. If the Payment Portal is not enabled, it is on the bottom right, to the right of the AMOUNT DUE box.



    4. Enter any applicable **Insurance Information** message under the "*Change of address or health insurance information*" on page 2 (If no message is entered, the "Insurance Information" header w not print).

7. **Configure Your General Template Settings:**

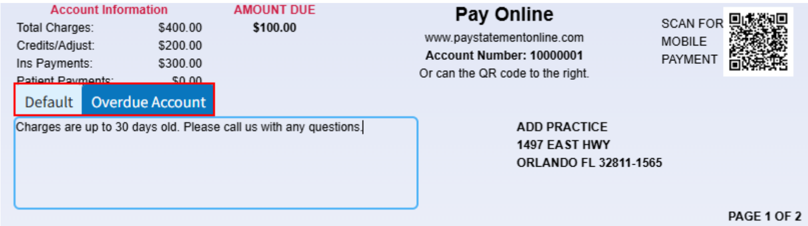
    1. Click the **General tab** from the side panel to access general settings that apply to automated & user-print statements.

        1. Select the **credit cards accepted** by this practice by checking the box(es).

> 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**:
   - **Statement Pay-To address**: 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**:
   - **Statement Return address**: 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.

8. **Configure Your Payment Plan Statement Options**:
   1. Click the **Payment Plan Statement Options tab** from the side panel to access payment plan settings that apply to automated & user-print statements.
      1. **Use a different patient charge (important) message if account is overdue:** Enable this option to edit the message based on if the account is overdue or not (options are Default or Overdue Account).



  2. **Use patient comment (if exists) in place of the important message:** Enable this option to use the patient comments instead of the patient charge message.

9. Click **Save**.

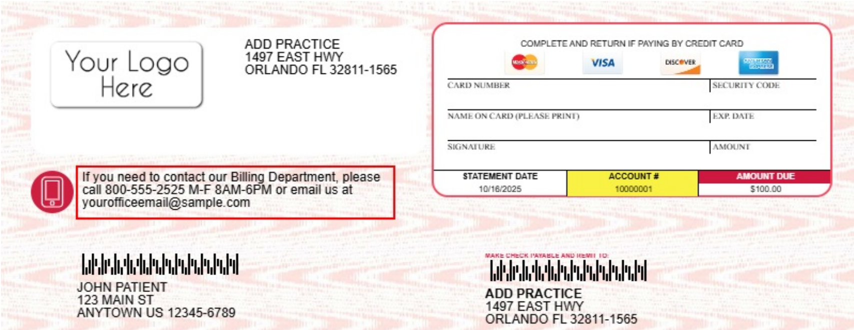
Configure Automated Final Demand Letter Template

Follow the steps below to configure the Automated Final Demand Letter (FDN) Template.

1. Select **Customer Setup** > **Statements**.
2. Use the ***Select a Practice to Manage Statement Configuration for*** drop-down menu to choose the desired practice.
3. Under the "*Automation Statement Generation*" table, click **Edit Templates**.

   > To configure the FDN template, it must first be enabled within the Statement Automation Settings. Visit our FDN Options Help Article for more information on enabling automated final demand letter generation.

4. Use the drop-down menu to select the **Final Demand Letter** option to configure.
5. Place a check in the **Highlight editable fields** box to show all of the fields that you are able to edit.
6. **Configure your Final Demand Letter Design**
   1. Optional: **Add A Logo** to your statement.
      1. Click the **Your Logo Here** icon, then click **Upload** to select a logo from your computer.
      2. Adjust the logo.
      3. Click **Done**.
   2. Enter any applicable phone message in the top-left of the statement, below the address.


Your Logo Here

ADD PRACTICE
1497 EAST HWY
ORLANDO FL 32811-1565

If you need to contact our Billing Department, please call 800-555-2525 M-F 8AM-6PM or email us at yourofficeemail@sample.com

COMPLETE AND RETURN IF PAYING BY CREDIT CARD

CARD NUMBER	SECURITY CODE
NAME ON CARD (PLEASE PRINT)	EXP. DATE
SIGNATURE	AMOUNT

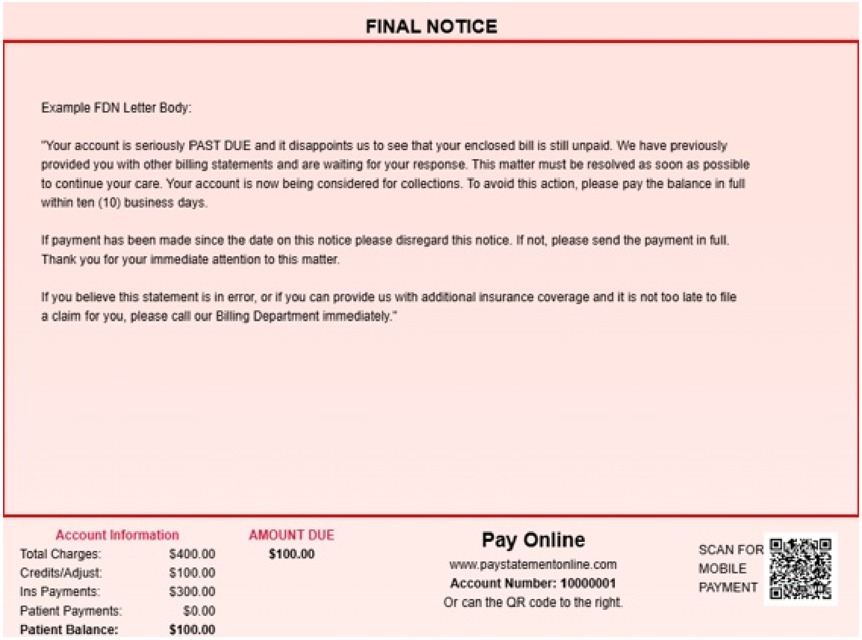
STATEMENT DATE	ACCOUNT #	AMOUNT DUE
10/16/2025	10000001	$100.00

JOHN PATIENT
123 MAIN ST
ANYTOWN US 12345-6789

MAKE CHECK PAYABLE AND REMIT TO

ADD PRACTICE
1497 EAST HWY
ORLANDO FL 32811-1565

3. Enter your final demand letter's body within the **Final Notice** section.


FINAL NOTICE

Example FDN Letter Body:

"Your account is seriously PAST DUE and it disappoints us to see that your enclosed bill is still unpaid. We have previously provided you with other billing statements and are waiting for your response. This matter must be resolved as soon as possible to continue your care. Your account is now being considered for collections. To avoid this action, please pay the balance in full within ten (10) business days.

If payment has been made since the date on this notice please disregard this notice. If not, please send the payment in full. Thank you for your immediate attention to this matter.

If you believe this statement is in error, or if you can provide us with additional insurance coverage and it is not too late to file a claim for you, please call our Billing Department immediately."

Account Information		AMOUNT DUE
Total Charges:	$400.00	$100.00
Credits/Adjust:	$100.00	
Ins Payments:	$300.00	
Patient Payments:	$0.00	
Patient Balance:	**$100.00**	

Pay Online
www.paystatementonline.com
Account Number: 10000001
Or can the QR code to the right.

SCAN FOR MOBILE PAYMENT

4. Enter any applicable **Patient Charge (Important) Message**.

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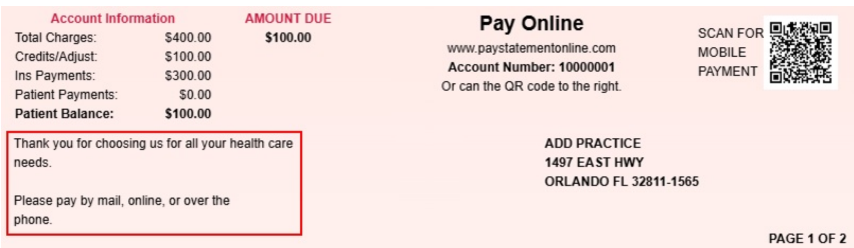
Account Information		AMOUNT DUE
Total Charges:	$400.00	$100.00
Credits/Adjust:	$100.00	
Ins Payments:	$300.00	
Patient Payments:	$0.00	
Patient Balance:	**$100.00**	

Thank you for choosing us for all your health care needs.

Please pay by mail, online, or over the phone.

Pay Online
www.paystatementonline.com
Account Number: 10000001
Or can the QR code to the right.

SCAN FOR MOBILE PAYMENT

ADD PRACTICE
1497 EAST HWY
ORLANDO FL 32811-1565

PAGE 1 OF 2

5. Enter any applicable **Insurance Information** message under the "*Change of address or health insurance information*" on page 2 (If no message is entered, the "Insurance Information" header w not print).

7. **Configure Your General Template Settings**:

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

8. Click **Save**.