

Configure Automated Payment Plan Statement Template

† Modified on 10/28/2025 4:36 pm EDT

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** dropdown menu to choose the desired practice.
3. Under the "Automation Statement Generation" table, click **Edit Templates**.

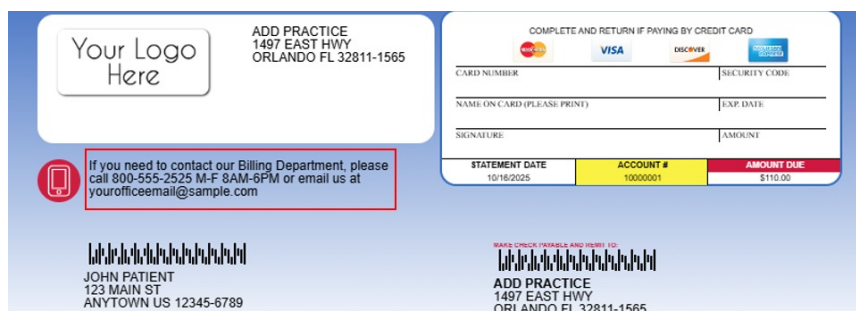
 To configure the payment plan statement template, it must first be enabled within the Statement Automation Settings. Visit our [Payment Plan Options Help Article](#) for more information on enabling automated payment plan generation.

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.



The image shows a sample payment plan statement template. It features a header section with a logo placeholder labeled "Your Logo Here" and practice information: "ADD PRACTICE 1497 EAST HWY ORLANDO FL 32811-1565". Below the logo is a contact box with a phone icon and text: "If you need to contact our Billing Department, please call 800-855-2525 M-F 8AM-6PM or email us at yourofficeemail@sample.com". The main body of the statement includes a credit card payment section with fields for "CARD NUMBER", "SECURITY CODE", "NAME ON CARD (PLEASE PRINT)", "EXP. DATE", "SIGNATURE", and "AMOUNT". Below this is a table with three columns: "STATEMENT DATE" (10/16/2025), "ACCOUNT # 10000001", and "AMOUNT DUE \$110.00". At the bottom, there are two barcode sections. The left barcode is for "JOHN PATIENT 123 MAIN ST ANYTOWN US 12345-6789". The right barcode is for "ADD PRACTICE 1497 EAST HWY ORLANDO FL 32811-1565".

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.

Account Information		AMOUNT DUE	Pay Online	SCAN FOR MOBILE PAYMENT
Total Charges:	\$400.00	\$100.00	www.paystatementonline.com	
Credits/Adjust:	\$200.00		Account Number: 10000001	
Ins Payments:	\$300.00		Or scan the QR code to the right.	
Patient Payments:	\$0.00			
Patient Balance:	\$100.00			
Please call us if you have any questions regarding these charges.			ADD PRACTICE 1497 EAST HWY ORLANDO FL 32811-1565	

PAGE 1 OF 2

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 will 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 institution 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).

Account Information		AMOUNT DUE	Pay Online		SCAN FOR MOBILE PAYMENT
Total Charges:	\$400.00	\$100.00	www.paystatementonline.com		
Credits/Adjust:	\$200.00		Account Number: 10000001		
Ins Payments:	\$300.00		Or scan the QR code to the right.		
Patient Payments:	\$0.00				
☐ Default ☒ Overdue Account					
Charges are up to 30 days old. Please call us with any questions.			ADD PRACTICE 1497 EAST HWY ORLANDO FL 32811-1565		

PAGE 1 OF 2

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**.