

Configure Automated Final Demand Letter Template

† Modified on 10/16/2025 5:26 pm EDT

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

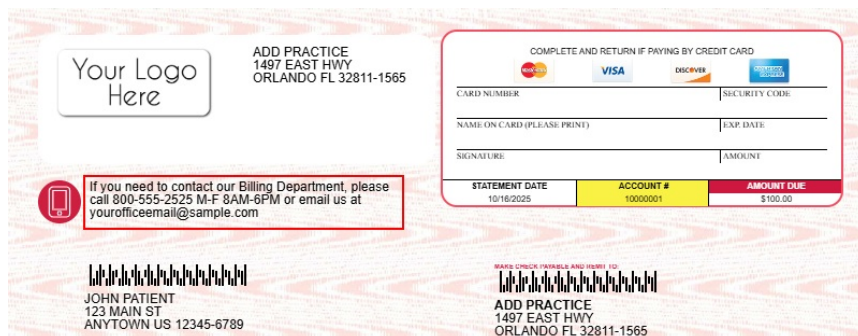
 To configure the FDN template, it must first be enabled within the Statement Automation Settings. Visit our [FDN Options Help Article](#) for more information on enabling automated final demand letter generation.

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.



The image shows a sample Final Demand Letter template. It features a header section with a logo placeholder labeled "Your Logo Here" and a practice address: "ADD PRACTICE, 1497 EAST HWY, ORLANDO FL 32811-1565". Below the logo is a contact box for the Billing Department. The main body contains a credit card payment section with fields for card number, security code, name, and expiration date. At the bottom, there are two identical blocks for patient information, each starting with a barcode and the address "ADD PRACTICE, 1497 EAST HWY, ORLANDO FL 32811-1565".

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

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 Total Charges: \$400.00 Credits/Adjust: \$100.00 Ins Payments: \$300.00 Patient Payments: \$0.00 Patient Balance: \$100.00		AMOUNT DUE \$100.00	Pay Online www.paystatementonline.com Account Number: 10000001 Or scan the QR code to the right.
		SCAN FOR MOBILE PAYMENT 	

4. 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 Total Charges: \$400.00 Credits/Adjust: \$100.00 Ins Payments: \$300.00 Patient Payments: \$0.00 Patient Balance: \$100.00		AMOUNT DUE \$100.00	Pay Online www.paystatementonline.com Account Number: 10000001 Or scan the QR code to the right.	SCAN FOR MOBILE PAYMENT 
Thank you for choosing us for all your health care needs. Please pay by mail, online, or over the phone.		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 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. Click **Save**.
