

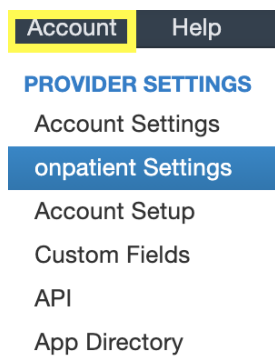
Automatically Sending Statements to OnPatient

07/24/2024 12:34 pm EDT

Through OnPatient you can send your patient their billing statements. If you have a payment integration DrChrono Payments connected to your DrChrono account, patients can also make payments through the portal.

The first step is to enable the setting to send statements to OnPatient.

1. Go to **Account** then select **OnPatient Settings**. This will take you to the OnPatient Settings page, where all patient portal-related settings are stored.

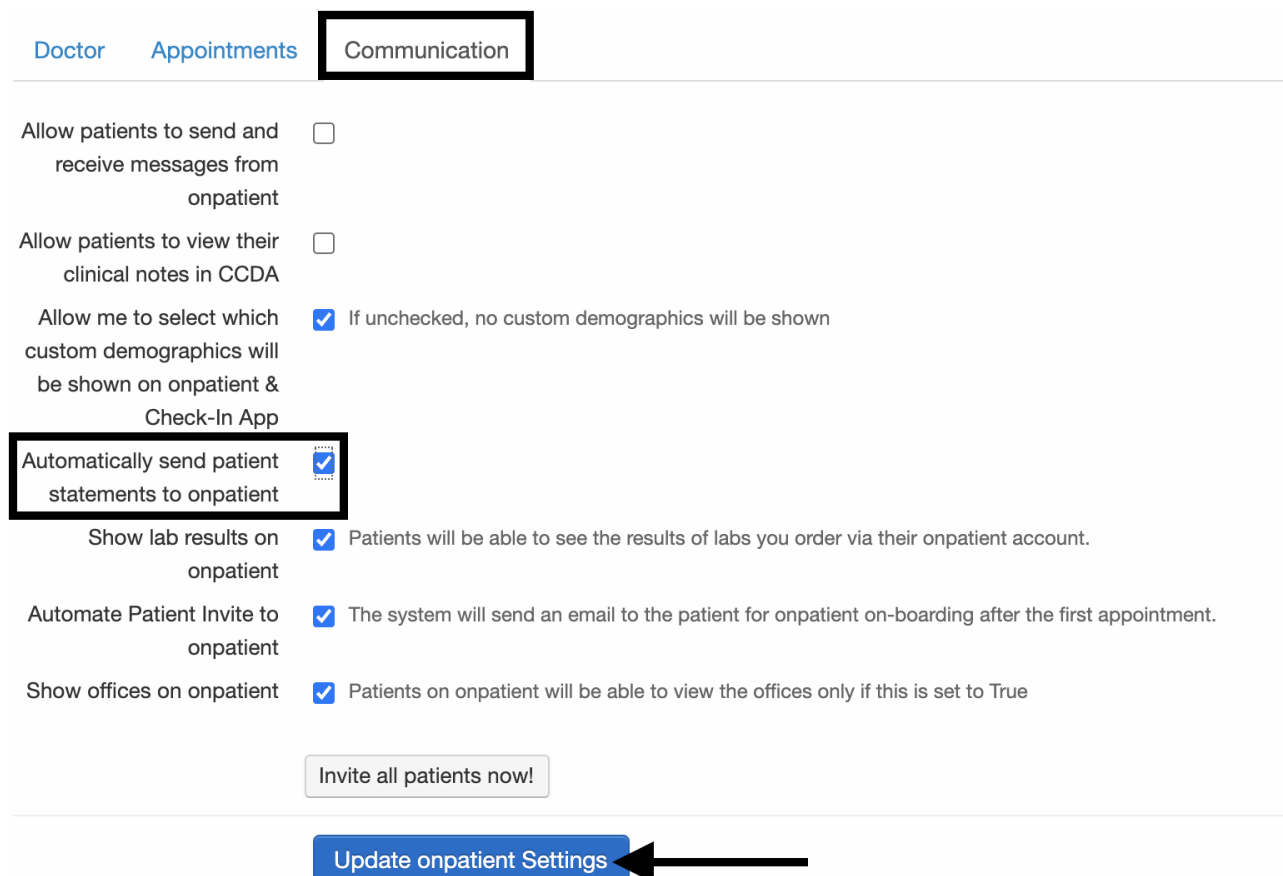


Account Help

PROVIDER SETTINGS

- Account Settings
- onpatient Settings**
- Account Setup
- Custom Fields
- API
- App Directory

2. Click on the **Communication** tab. Check the **Automatically send patient statements to OnPatient** check box.



Doctor Appointments **Communication**

- Allow patients to send and receive messages from onpatient
- Allow patients to view their clinical notes in CCDA
- Allow me to select which custom demographics will be shown on onpatient & Check-In App If unchecked, no custom demographics will be shown
- Automatically send patient statements to onpatient**
- Show lab results on onpatient Patients will be able to see the results of labs you order via their onpatient account.
- Automate Patient Invite to onpatient The system will send an email to the patient for onpatient on-boarding after the first appointment.
- Show offices on onpatient Patients on onpatient will be able to view the offices only if this is set to True

Invite all patients now!

Update onpatient Settings

3. Click **Update OnPatient Settings** to apply your change.

4. Once this checkbox is selected, every time you send a statement through **Billing > Patient Statements**, a copy of the patient's statement is delivered to the patient's OnPatient portal.

The screenshot shows the 'Patient Statements' management interface. At the top, there are tabs for 'Active Patients' and 'All Patients'. Below are search filters including 'Patient Group', 'Patient Flags', and 'Selected Flags'. A 'Calculate All' button is present. There are checkboxes for 'Include pt with zero bal' and 'Include a summary with balance for each provider'. A 'Statement due date' field is set to 'Due Date'. A note states: 'Please note: printing or mailing any statement will also make that statement available to patients in onpatient. To disable this, uncheck "Automatically mail statements to onpatient" in onpatient Settings > Communication.' Below this, it says '1 Patients Selected' with a 'Deselect All' button. A table lists patient records with columns: Patient, Chart ID, Last Appt, Upcoming Appt, Total Stmt, Last Stmt, Last Payment Amt, and Last Payment Date. One record is shown for Jenny (Jen) Harris. A dropdown menu is open over the table, listing actions: Print PDF, Mail Statements, Print Transactions, Mail Transactions, Print Itemized Statement, and Export CSV.

Viewing Patient Statements

1. Patients will receive a notification in their email that they have a new statement.

You have a new statement available Inbox x

no-reply@onpatient.com

9:21 AM (10 minutes ago)

to me ▾

The screenshot shows an email notification from OnPatient. The email body contains the following text: 'Hello Jenny Harris, You have a new billing statement available. Sign into onpatient.com to see it. Thank you, the onpatient team'. The OnPatient logo is visible at the top of the email content area.

2. After logging in to OnPatient, a PDF of the statement will be available for the patient's individual records by clicking on **View**, under the **Billing** tab

The screenshot shows the OnPatient user interface with the 'Billing' tab selected. The top navigation bar includes 'onpatient', 'Appointments', 'Doctors', 'Billing', 'Messages', 'Documents', and 'Health Profile'. The user's name 'Jenny Harris' is in the top right. Below the navigation bar, there is a 'Billing' section with a 'Make a payment' button. A table displays a billing statement for 'James Smith' generated on 'October 2, 2020 at 9:21 AM' with a 'Statement Balance' of '\$1,498.00'. The 'Actions' column for this statement includes a 'View' button and a 'Pay \$1,498.00' button.



Dr. Nick's Walk-In Clinic
 225 Schilling Circle
 21212, MD Baltimore

Statement ID: 205858-88969944-PREVIEW		
Statement Date	Pay This Amount	Chart ID
10/02/2020	\$1,498.00	HAJE000001
SHOW AMOUNT PAID HERE:	\$	

Edward
 2 Castro Street
 Mountain View, CA 94040

MAKE CHECKS PAYABLE / REMIT TO:

Dr. Nick's Walk-In Clinic
 Hunt Valley , MD 21031, USA
 Hunt Valley, MD 21031

For questions about billing, call (443) 555-5555. To pay by credit card, call (443) 555-5555.
 You can also pay by credit card online at onpatient.com - If you don't have access, call (443) 555-5555 to request an account.

.....
 Please detach and return top portion with your payment.

Patient: Jenny Harris	Chart ID: HAJE000001	Statement ID: 205858-88969944-PREVIEW
Responsible Party: Edward		Responsible Party Phone: (516) 232-2325

Date of Service	Provider	Procedure	Mods	Charge	Adjmt	Ins. Paid	Pt Paid	Bal Due
8/13/2020 08:00AM	James Smith	99203 - OFFICE/OUTPATIENT VISIT NEW	:::	\$150.00				\$150.00
Total:				\$150.00				\$150.00