

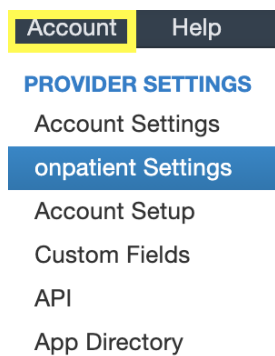
# Automatically Sending Statements to OnPatient

07/08/2024 7:34 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.

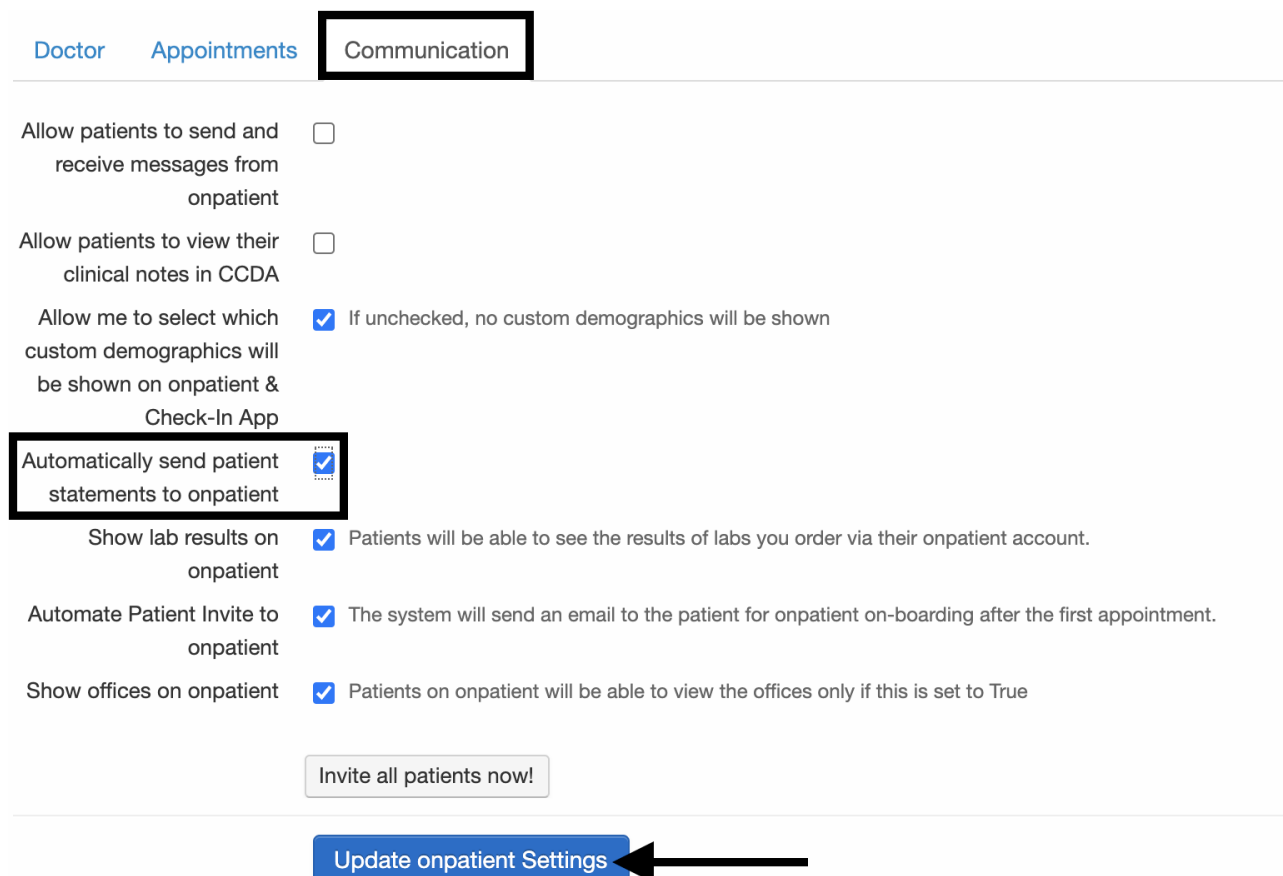


Account Help

**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 that, there are search and filter options, including a dropdown for 'Patient Group' (set to 'All'), a 'Patient Flags' field, and a 'Selected Flags' dropdown. A 'Search' button is present. Below the search area, there are checkboxes for 'Include pt with zero bal' and 'Include a summary with balance for each provider'. A 'Calculate All' button is also visible. A 'Statement due date' field is set to 'Due Date'. A note indicates that 'Print PDF' will show only claims with a patient balance but no insurance balance, and 'Print Transaction' will show all appointments. A dropdown menu is open, showing options: 'Print PDF', 'Mail Statements', 'Print Transactions', 'Mail Transactions', 'Print Itemized Statement', and 'Export CSV'. Below the menu, a table shows '1 Patients Selected' with columns for Patient, Chart ID, Last Appt, Upcoming Appt, Total Stmt, Last Stmt, Last Payment Amt, and Last Payment Date. One patient, Jenny (Jen) Harris, is listed with a last statement date of Sep 4, 2020, and a last payment amount of \$59.00.

## 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 Billing tab interface. At the top, there is a navigation menu with 'Billing' selected. Below the menu, there is a 'Make a payment' button. A table displays billing statements with columns for Doctor, Generated on, Statement Balance, and Actions. A statement for James Smith is shown with a balance of \$1,498.00 and a 'Pay \$1,498.00' button. The 'View' button is also visible.



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

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

**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.

<b>Patient:</b> Jenny Harris	<b>Chart ID:</b> HAJE000001	<b>Statement ID:</b> 205858-88969944-PREVIEW
<b>Responsible Party:</b> Edward		<b>Responsible Party Phone:</b> (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
<b>Total:</b>				<b>\$150.00</b>				<b>\$150.00</b>