

Enhanced Patient Statement Delivery

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Providers that currently use DrChrono patient statements now have access to an enhanced patient statement delivery system designed to improve patient engagement and reduce costs. This new multi-channel solution automatically delivers statements through a strategic sequence of communication methods—text messages, email, and physical mail—ensuring patients receive their statements as effectively and efficiently as possible.

How It Works

The process begins by checking the patient's chart for a valid mobile number.

- If one is found, a digital patient statement is sent via **text message**. If the patient does not open the text, the system will follow up in 2-3 days with a reminder text. If an additional 2-3 days pass without the patient opening the text, a paper statement will be mailed to the address on file.

If a valid mobile number is not found, the system will check for an email address.

- If one is found, an electronic patient statement is sent via email. If the patient does not open the email, the system will follow up in 2-3 days with a reminder email. If an additional 2-3 days pass without the patient opening the email, a paper statement will be mailed to the address on file.

If neither a valid mobile number nor an email is found in the patient's chart, a paper statement will be mailed to the address on file.



If the patient opens either the text or the email, the process stops, indicating that the statement has been successfully received. No paper statement will be sent.

This layered approach ensures reliable delivery while prioritizing speed and cost-effectiveness. The process depends on the patient's chart, which must include a valid mobile phone number and email address. If the mobile phone number is missing, the process will move to an emailed statement. If the email address is missing, the process will move to a printed statement to the address on file in the patient's chart.

Documentation in the patient's chart

To see which type of statement your patient received:

1. Navigate to the Patient's Chart

- #### 4. Scroll down to the Last Patient Statements section

Demographics

Sufficient patient demographics to bill insurance.

Important

Demographics

Insurances

Authorizations

Smoking Status

Flags

Balance

DrChrono Payments

Patient Account Balance

Total Billed	\$1,350.00	Total Allowed
Total Allocated	\$100.00	Total Adjustment
Total Patient Paid:	\$100.00	Total Insurance Paid
Patient Balance:	\$75.00	Insurance Balance:
Last Patient Payment:	\$50.00 posted on 11/20/2023	Next Appointment:

Full Transaction History

Patient Payments

Print Balance Report

Patient Follow-Up

Statement Date	Statement Amount	Notes	Follow-Up Date
No Patient Follow-Ups			

Last Patient Statements

Under the Type column, you could see different entries depending on what information is located in the patient's chart.

- **Print**
 - The statement PDF has been generated and is in your mailbox.
- **Text**
 - The system found a mobile phone number listed for the patient.
 - The system found both a mobile phone number and an email for the patient.
- **Email**
 - The system found no mobile phone number but did find an email address for the patient.
- **Mail**
 - The system did not find a mobile phone number or email listed for the patient.

Last Statement Date	Status	Created By	Type	Balance	Action
Sept. 9, 2025			Print	\$110.00	Show PDF Follow Up
March 25, 2025	Printed	Deborah D	Mail	\$110.00	Show PDF Follow Up CF

Sept. 19, 2025		Print	\$388.00	Show PDF	Follow Up
Sept. 16, 2025	Delivered	→ Text	\$388.00	Show PDF	Follow Up ↗

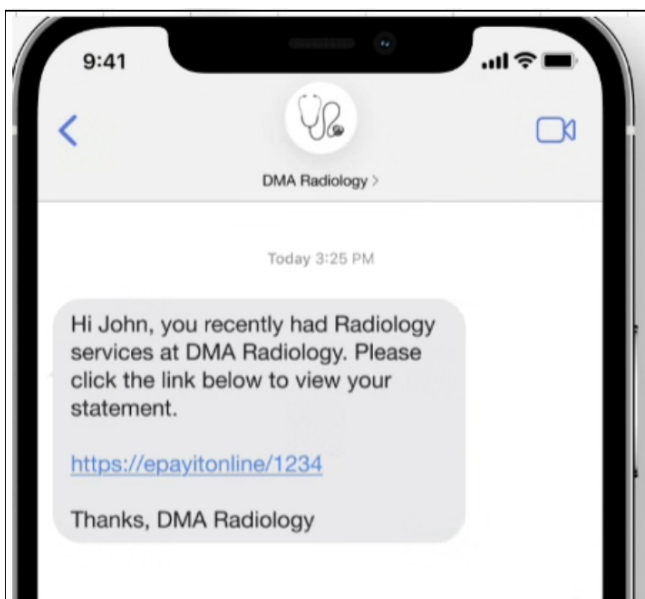
OnPatient

If you have OnPatient enabled for your DrChrono account, patients who open the text or email statement will be taken to the OnPatient portal to submit an electronic payment.


If you do not have OnPatient enabled for your DrChrono account, the patient will receive a copy of their statement via text or email.

Example statements

Text/Email Message



Paper Statement







DMA Diagnostic services
PO BOX 2305, ALPHARETTA, GA 30023-2305

STATEMENT

00001

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	

Billing Office Phone:

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MAKE CHECK PAYABLE AND REMIT TO:

DETACH TOP PORTION AND RETURN WITH PAYMENT IN ENCLOSED ENVELOPE

DATE	DESCRIPTION	CHARGES	PYMTS	ADJMTS	BALANCE
	Visit Totals for Claim # Patient:	\$249.38	\$93.67	\$145.71	\$10.00
	Provider: Location of Service:				
04/24/2025	99214-OFFICE O/P EST MOD 30 MIN	\$249.38	\$93.67	\$145.71	\$10.00
05/08/2025	Insurance Adjustment (Primary)			\$145.71	
05/08/2025	Insurance Payment (Primary)		\$93.67		
	Deductible: Not Available, Co-Insurance: Not Available, Co-Pay: \$10.00				
04/24/2025	G8427-Docrev cur meds by elig clin	\$0.00	\$0.00	\$0.00	\$0.00
	Deductible: Not Available, Co-Insurance: Not Available, Co-Pay: Not Available				
Balance due upon receipt					

Account Information

Statement Date: 10/16/2025

Account:

Patient:

Patient Balance: \$10.00

AMOUNT DUE


\$10.00

For questions about billing, call

To pay by credit card, call

You can also pay by credit card online at onpatient.com - If you don't have access, call to request an account.

SCAN FOR MOBILE PAYMENT



Statement QR Code

If your account utilizes DrChrono Payments, the QR code printed on the paper statement will take the patient directly to a screen to make an electronic payment.

If your account does not utilize DrChrono Payments, the QR code will take the patient to the OnPatient Portal.

Flexible, Outcome-Based Pricing

The pricing for these enhanced statements is based on the method by which the patient ultimately receives and engages with the statement:

- **\$0.59 per statement** if the patient opens either the text or email
- **\$0.90 per statement** if a paper statement is sent

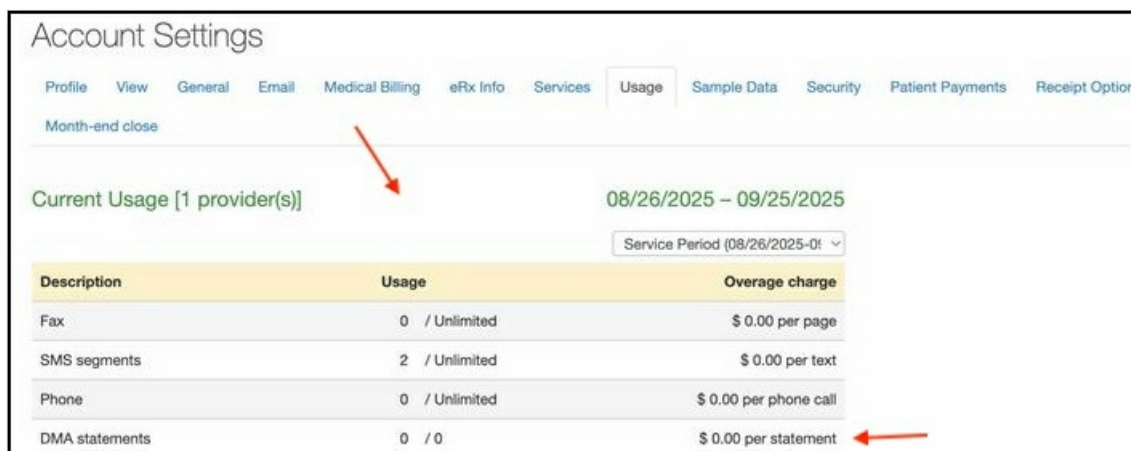
This tiered pricing structure rewards digital engagement by lowering the delivery cost while still ensuring traditional mail is used as a backup when needed, if there is no mobile number or email included on the patient's chart.

**** If you are an Apollo Plus customer, the above statement costs do not apply to your account. ****

Usage

To monitor the usage and successfully sent text/email statements, you can see the data in your account.

- Navigate to Account > Account Settings > Usage tab



The screenshot shows the 'Account Settings' page with the 'Usage' tab selected. A red arrow points to the 'Usage' tab. Below the tabs, it shows 'Current Usage [1 provider(s)]' and a service period of '08/26/2025 - 09/25/2025'. A table lists usage for Fax, SMS segments, Phone, and DMA statements. Another red arrow points to the 'DMA statements' row.

Description	Usage	Overage charge
Fax	0 / Unlimited	\$ 0.00 per page
SMS segments	2 / Unlimited	\$ 0.00 per text
Phone	0 / Unlimited	\$ 0.00 per phone call
DMA statements	0 / 0	\$ 0.00 per statement

Benefits for Providers


- **Cost Savings:** Reduce statement delivery costs by encouraging digital adoption.
- **Faster Payments:** Digital delivery typically results in quicker patient responses and faster collections.
- **Environmental Impact:** Minimize paper usage by leveraging digital communication first.
- **Automated Workflow:** Let the system handle the delivery sequence without staff intervention.

Turn on/off enhanced patient statements

If you would like to turn off enhanced patient statements, it can be done by navigating to **Account > Account Settings > Medical Billing Tab > Patient Statement** section.

Unchecking the box will turn off enhanced patient statements. Please note that this option will only appear on the Primary Provider's view. Turning it off will turn off enhanced patient statements for all providers in the office.

Patient Statement

Business Logo	<div>Top Left</div>	Include Business Logo in patient statements.
Pay to Address	<div>-----</div>	
 Enhanced Statements	<input checked="" type="checkbox"/>	Enable enhanced statements (Text/Email) for the entire practice.
Use Office Name	<input type="checkbox"/>	Use the Practice Official Name (if available) for patient statement and payment receipt.
Pay CC by Call	<input type="checkbox"/>	Show "To pay by credit card, call [office number]" in patient statement.
Credit Card Accepted	<input type="checkbox"/>	Visa
	<input type="checkbox"/>	Mastercard
	<input type="checkbox"/>	Discover
	<input type="checkbox"/>	American Express

The process for patient statement processing remains the same. If you would like additional info, please see the knowledge base articles for [processing patient statements](#).

To learn how the patient payment processing works with enhanced delivery, see [this article](#).