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

Payment processor note: The payment option via text/statement is **only** available for PaySimple customers. Customers (and their patients) using Stripe or Square will need to use the OnPatient app to accept a patient payment.

The process begins by checking the patient's chart for a valid mobile/cell phone 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. A sample text message that the patient will receive is listed below. If an additional 2-3 days pass without the patient opening the text, a paper statement will be mailed to the address on file.
    - Initial Email Text:

      Hi [BillToName], you recently had services from [Location]. Please click the link below to view your bill. If you have questions, please call us at [ClientPhone] or reply "STOP" to unsubscribe. Thank you.

    - Reminder Text Message:

      As a friendly reminder, you have a bill of [Balance] waiting for payment. To view and pay securely, follow this link

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. A sample email message that the patient will receive is listed below. 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. A sample paper statement that the patient will receive is listed below.

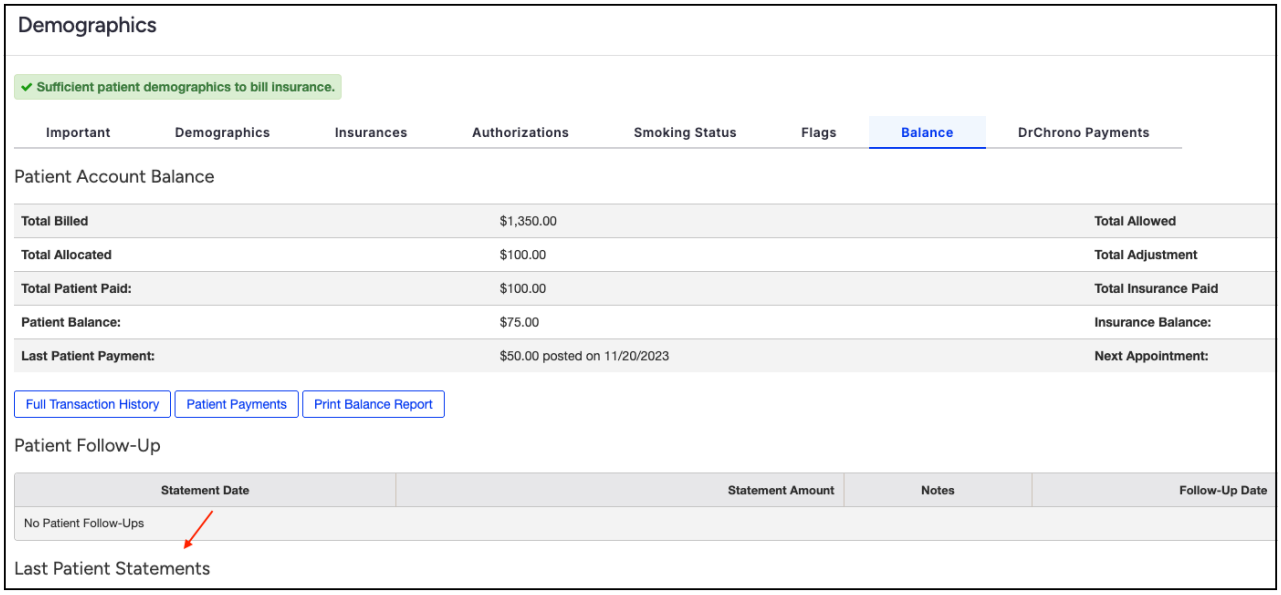
If the patient opens either the text or the email, the process stops, indicating that the statement has been successfully received. No paper statement will be sent.

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
2. Select Demographics
3. Select the Balance tab
4. Scroll down to the Last Patient Statements section



Under the Type column, you can see different entries depending on the information in the patient's chart and how they received the statement.

- **Print**
  - The statement PDF has been generated and is in your mailbox.

- **Text**
  - The system found a mobile/cell phone number listed for the patient.
  - The system found both a mobile/cell phone number and an email for the patient.
- **Email**
  - The system found no mobile/cell phone number but did find an email address for the patient.
- **Mail**
  - The system did not find a mobile/cell phone number or email listed for the patient.





OnPatient

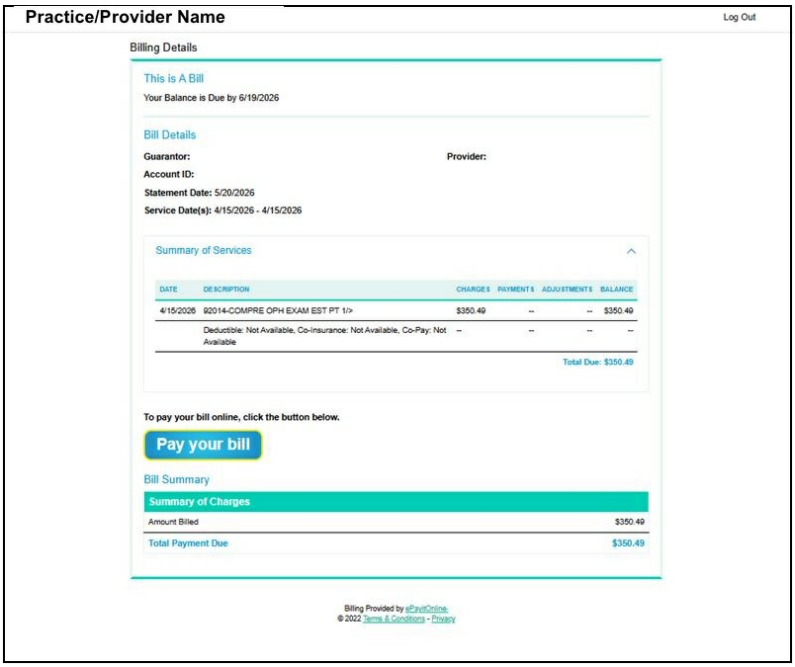
If you have OnPatient enabled for your DrChrono account, patients who open the text or email statement will be taken to the OnPatient portal to submit an electronic payment.

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





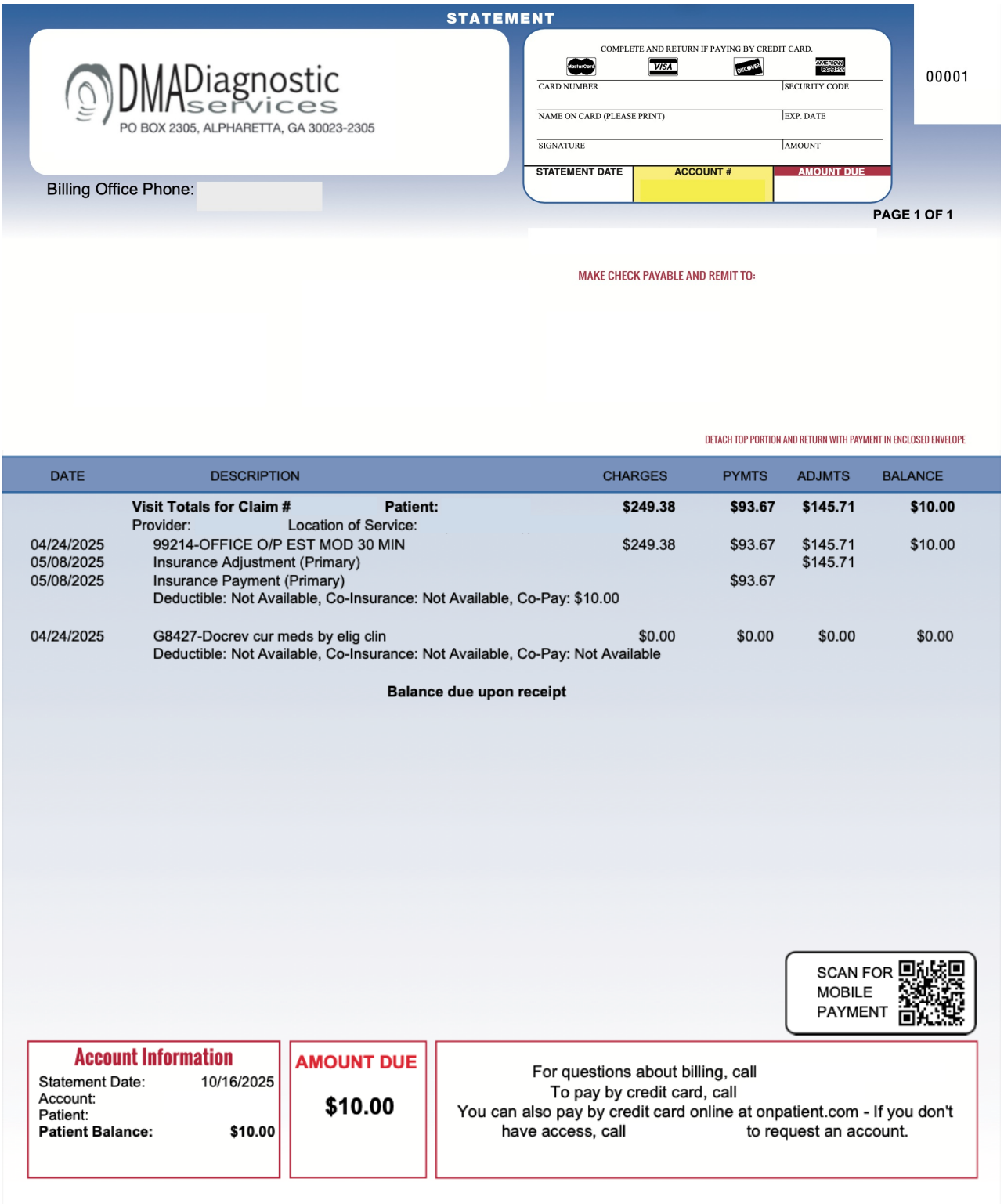
Initial Email Text:

Hi [BillToName], you recently had services from [Location]. Please click the link below to view your bill. If you have questions, please call us at [ClientPhone] or reply "STOP" to unsubscribe. Thank you.

Reminder Text Message:

As a friendly reminder, you have a bill of [Balance] waiting for payment. To view and pay securely, follow this link

Paper Statement



STATEMENT

DMADiagnostic services
PO BOX 2305, ALPHARETTA, GA 30023-2305

Billing Office Phone:

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

00001

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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

SCAN FOR MOBILE PAYMENT

Account Information

Statement Date: 10/16/2025
Account:
Patient:
Patient Balance: $10.00

AMOUNT DUE

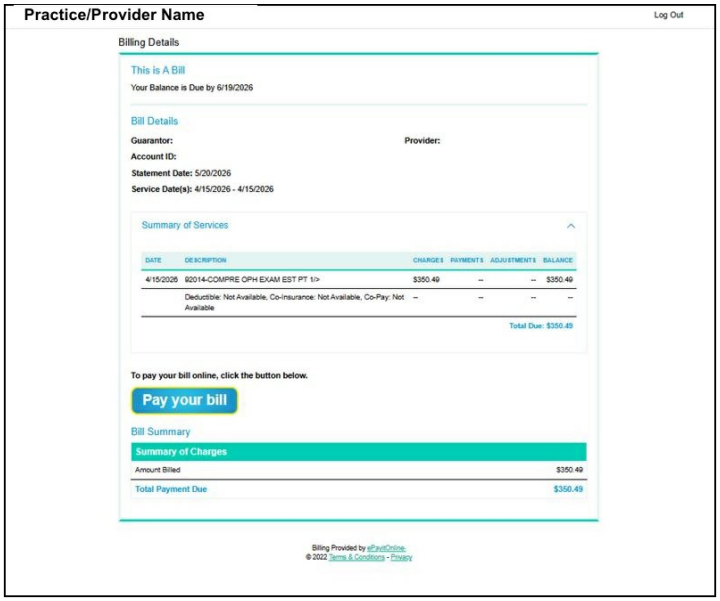
$10.00

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.

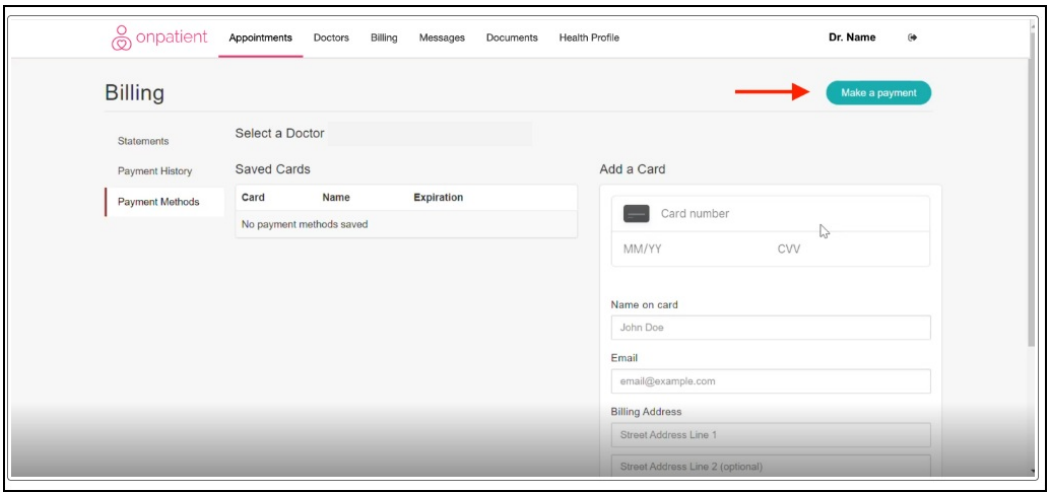
Statement QR Code

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.



Seamless Payment Process

The payment link and QR code are uniquely tied to each specific statement, ensuring accuracy and security. When patients select the link or scan the code, they're directed to a secure, user-friendly payment portal powered by DrChrono Payment's trusted hosted payment technology. This familiar interface makes the payment process quick and straightforward for patients of all technical comfort levels.

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

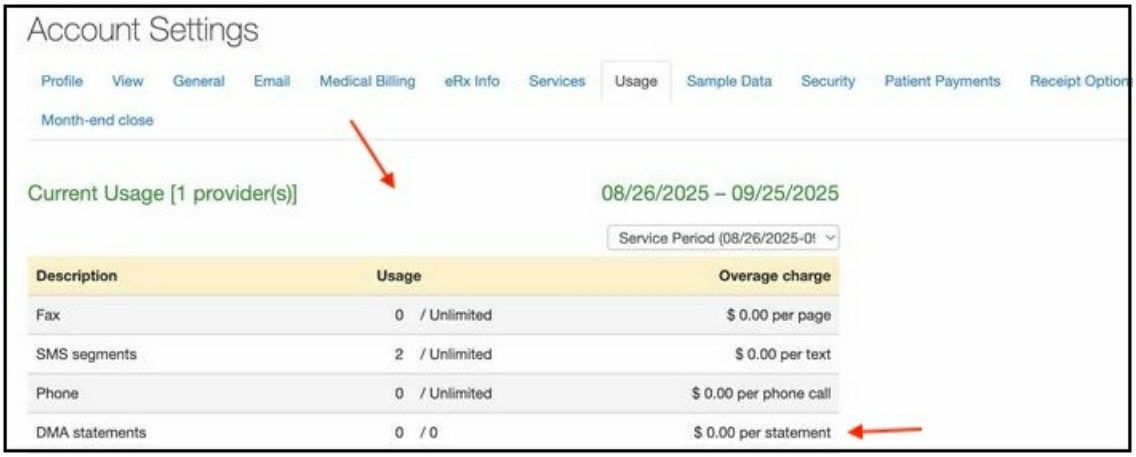
This tiered pricing structure rewards digital engagement by lowering the delivery cost while still ensuring traditional mail is used as a backup when needed, if there is no mobile number or email included on the patient's chart.

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

Usage

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

- Navigate to Account > Account Settings > Usage tab > DMA Statements



Benefits for Providers

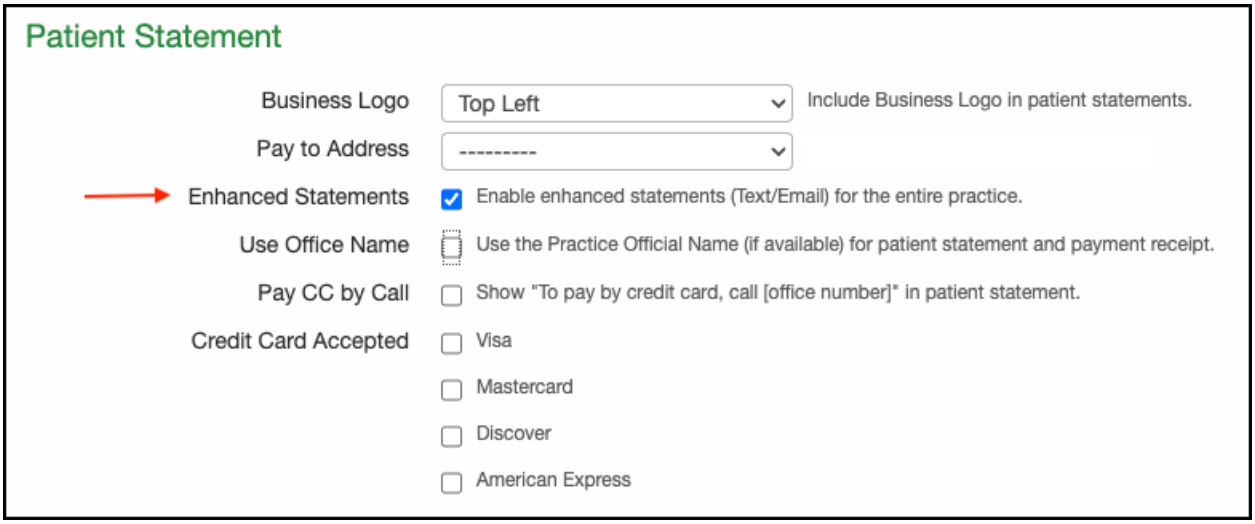
- **Cost Savings**: Reduce statement delivery costs by encouraging digital adoption.
- **Faster Payments**: Digital delivery typically results in quicker patient responses and faster collections.
- **Environmental Impact**: Minimize paper usage by leveraging digital communication first.

- **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.



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.