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 engagement and reduce costs. This new multi-channel solution automatically delivers statements through a strategic sequence of communication methods—text message/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 viatext message. If the patient does not open the text, the system will follow up in 2-3 days with a reminder text. If another 2-3 days pass without the patient opening the text, a paper statement will be mailed.

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 another 2-3 days pass without the patient opening the email, a paper statement will be mailed.

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

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.

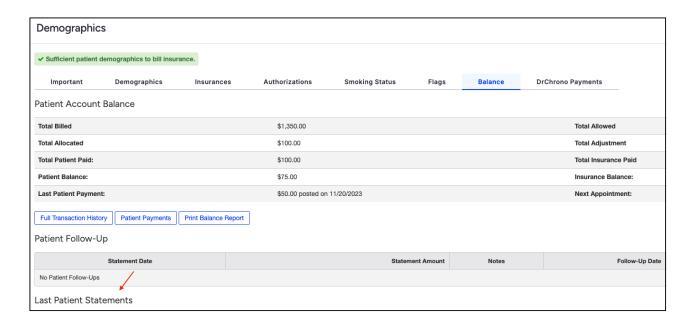
This layered approach ensures reliable delivery while prioritizing speed and cost-effectiveness. The process depends on the patient's chart, including a valid mobile phone number and email address. If the mobile phone number is missing, the process will move to an emailed statement. If the email address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

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

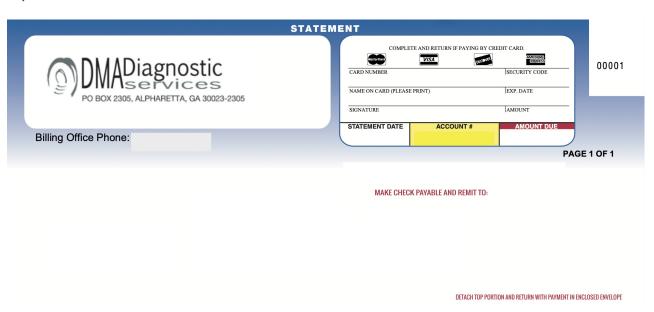
via text or email.

Example statements

Text/Email Message



Paper Statement



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

SCAN FOR DILE MOBILE PAYMENT

Account Information

Statement Date: 10/16/2025 Account:

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 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

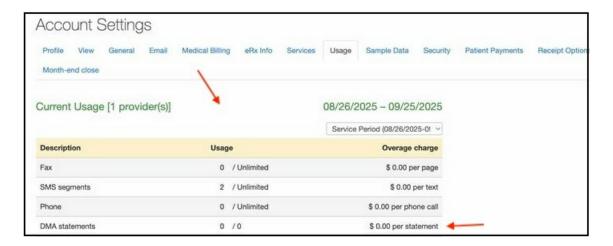
This tiered pricing structure rewards digital engagement by lowering the delivery cost while still ensuring traditional mail is used as a backup when needed, if there is no mobile number or email included on the patient's chart.

** 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



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