

AGILE E-STATEMENTS

Q&A

*New Feature” within Agile – patient’s now have the ability to receive electronic statements as an alternative to receiving a paper statement.

- **What is e-statements & what does it do?** An E-Statement is an electronic version of a patient statement
- **What is the primary purpose of an electronic statement?** To provide an alternative option to receiving a paper statement via mail
- **How does the FOC “explain the why” on how to use this e-statement feature?** If preference is to receive a statement(s) electronically vs paper. If e-Statement is sent, gives the patient the ability to pay their bill on-line, i.e. will take the patient right to the Company website.
- **When does the FOC select “e-statement” in Agile?** Can be acknowledged at any point in time. NOTE – once acknowledged, e-statements will generate if patient is due a statement. An E-Statement will generate, if the patient does not open/acknowledge the receipt, a second e-statement will generate. If BOTH e-statements are not acknowledged, a paper statement is then generated.
- **The FOC will check box the E-Statements selection within the “Patient Tab” of the patient’s chart (see below):** please note in order to receive e-statements, an email will need to be collected and entered within this same section of the chart. By doing so, the company that electronically sends statements will send an “activate email” to the patient which must be “activated” by the patient within that email to take effect. Once the account is activated, e-statements will begin to be sent next business cycle.

The screenshot shows a patient registration form. On the left, there is an 'Email' field containing 'minniemouse@disneyworld.com', which is circled in red. Below it, the 'Preferred Contact Method' section has radio buttons for 'Phone', 'Text', 'Email' (which is selected), and 'No Contact'. To the right of the email field is the 'Communication Subscriptions' section, which includes checkboxes for 'Clinic Promotions', 'Appointment Reminders', 'Provider Updates', 'Satisfaction Survey', and 'E-Statements'. The 'E-Statements' checkbox is circled in red. Further to the right is the 'Marketing Sources' section with a dropdown menu showing 'Family/Friend' and a close button (X).