How to set up patient statements in eClinicalWorks

This guide shows you how to set up patient statements in eClinicalWorks (eCW). You will opt a patient out of paper statements, configure the Patient Portal so patients can view and pay statements, customize the statement notification email, and see how a patient reviews and pays a statement in the portal.

Prerequisites

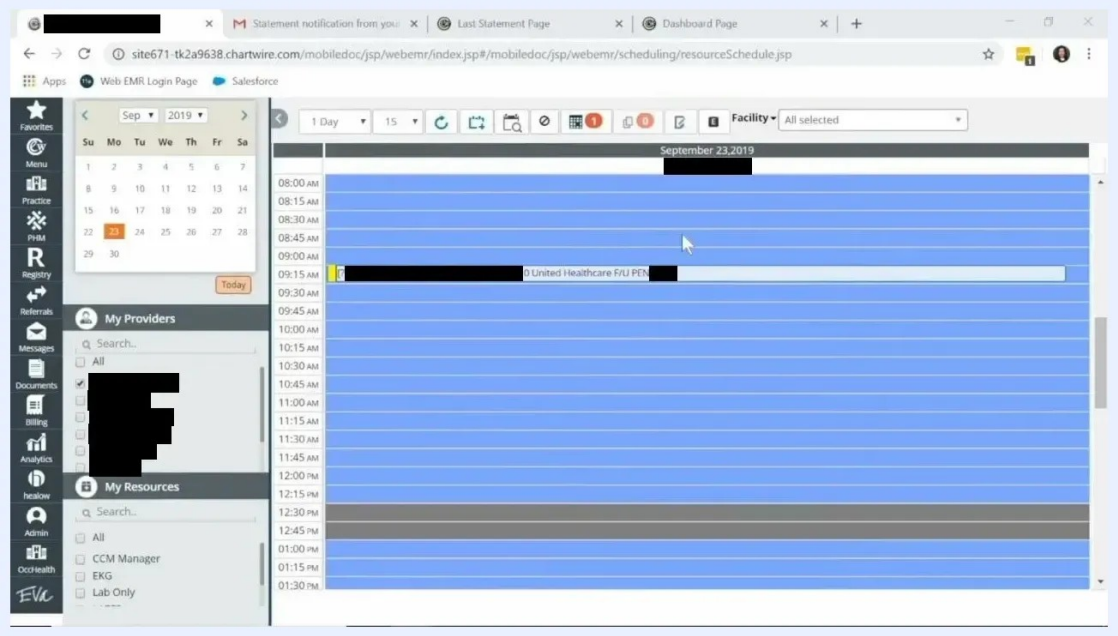
- Access to the eCW practice management software, and you are logged in.
- Access to the main scheduling or dashboard page, with the provider schedule and navigation sidebar visible.
- A patient record to work with. A test patient works well.
- A patient portal username and password to check the patient's view.

Part 1: Enable paperless statements for a patient

Step 1. Open the eCW dashboard

Launch eCW and go to the main scheduling or dashboard page. Confirm you can see the provider schedule for the selected date (for example, September 23, 2019) and the navigation menu.

The left sidebar shows Favorites, Menu, Practice, PHM, Registry, Referrals, Messages, Documents, Billing, Analytics, healow, Admin, and OccHealth.

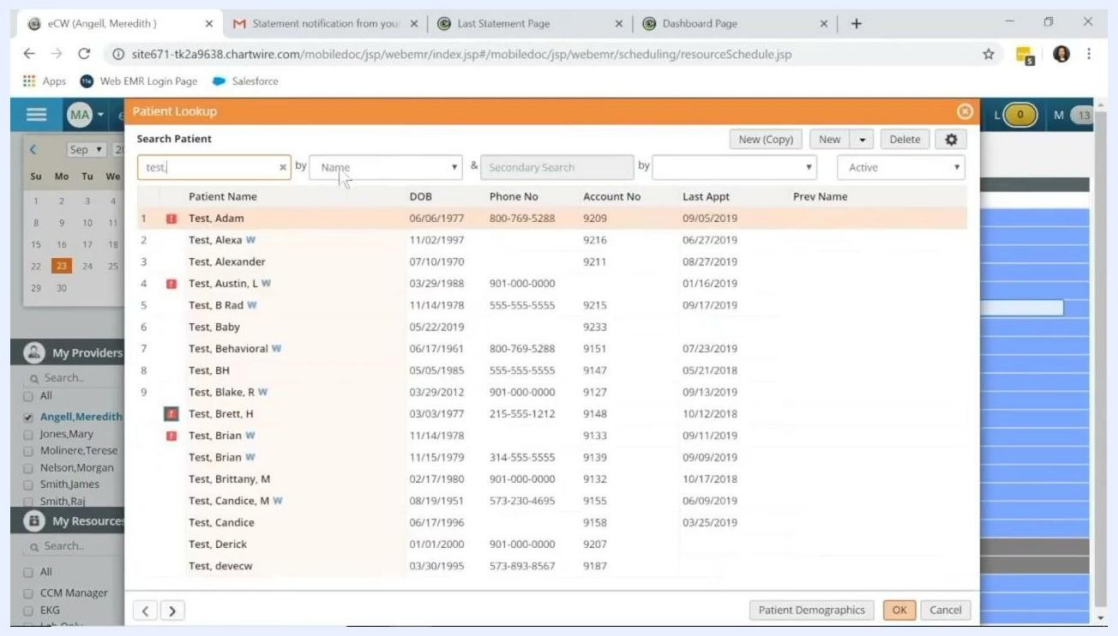


eCW dashboard with the provider schedule, calendar, and navigation sidebar visible

Step 2. Search for the patient

1. Click the patient search or lookup option.
2. In the **Patient Lookup** dialog, enter the patient's name in the search field. For a test patient, you can type "test".
3. Review the matching patients. The list shows Patient Name, DOB, Phone No, Account No, Last Appt, and Prev Name.

4. Select the patient you want, for example "Test, Adam" or "Test, Marie M".

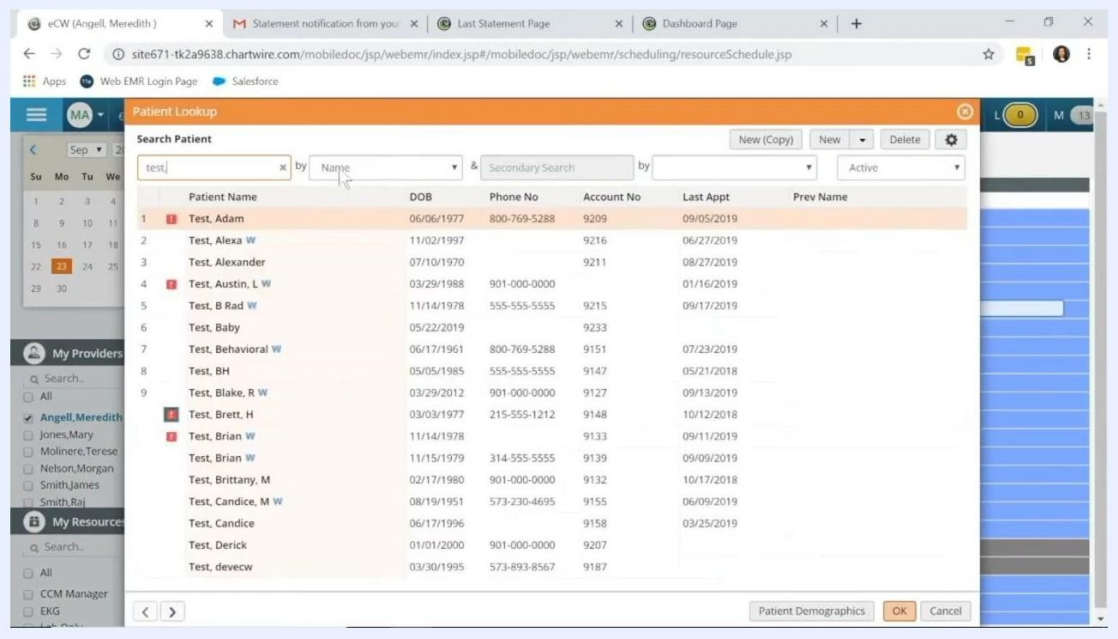


Patient Lookup dialog showing search results for "test" with patient details

Step 3. Open the patient's demographics

With the patient selected, click the **Patient Demographics** button to open the patient's demographic information.

The screen shows fields such as Account No, Name, DOB, Address, Phone, Email, PCP, Referring Provider, Marital Status, Language, Race, Ethnicity, Account Balance, and Patient Balance.



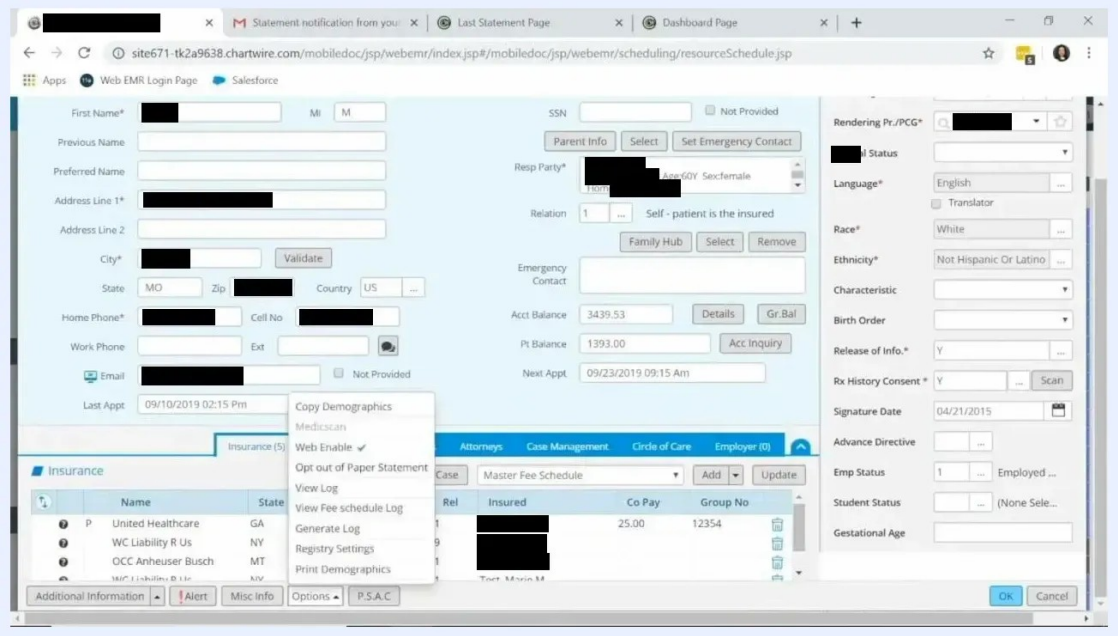
Patient demographic screen with all fields and balances visible

Step 4. Open the Options menu

At the bottom of the patient demographic screen, click **Options**. A dropdown menu appears with these choices:

- Copy Demographics
- Medicscan
- Web Enable
- Opt out of Paper Statement
- View Log
- Generate Log
- Registry Settings

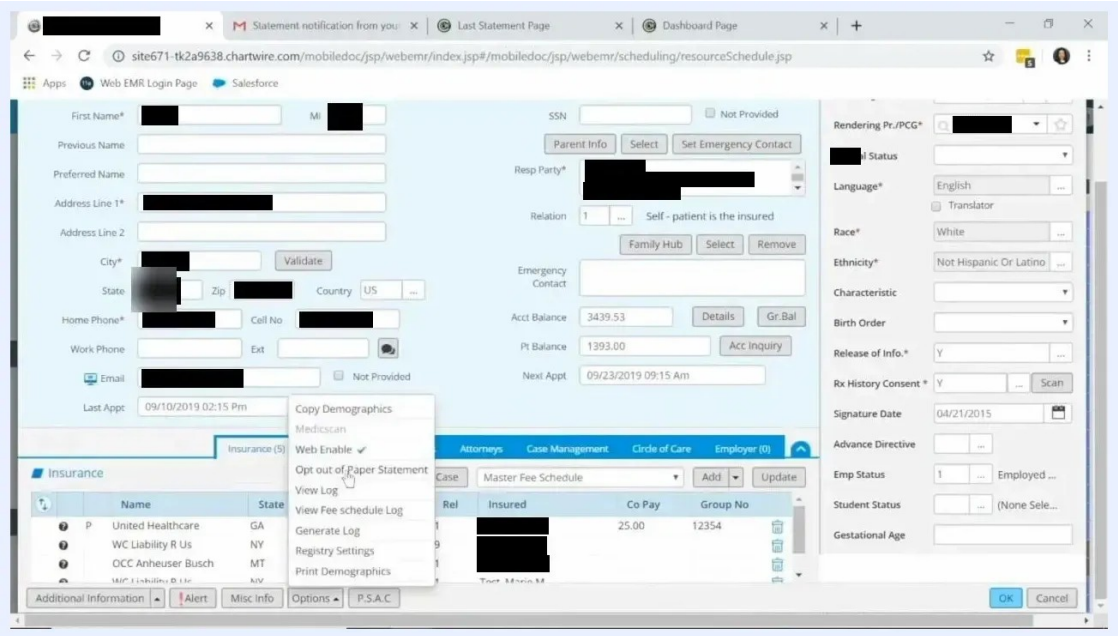
- Print Demographics



Options dropdown open at the bottom of the patient demographic screen, showing Opt out of Paper Statement

Step 5. Opt the patient out of paper statements

In the **Options** dropdown, select **Opt out of Paper Statement**. When the option is checked (✓), the patient does not receive paper statements.

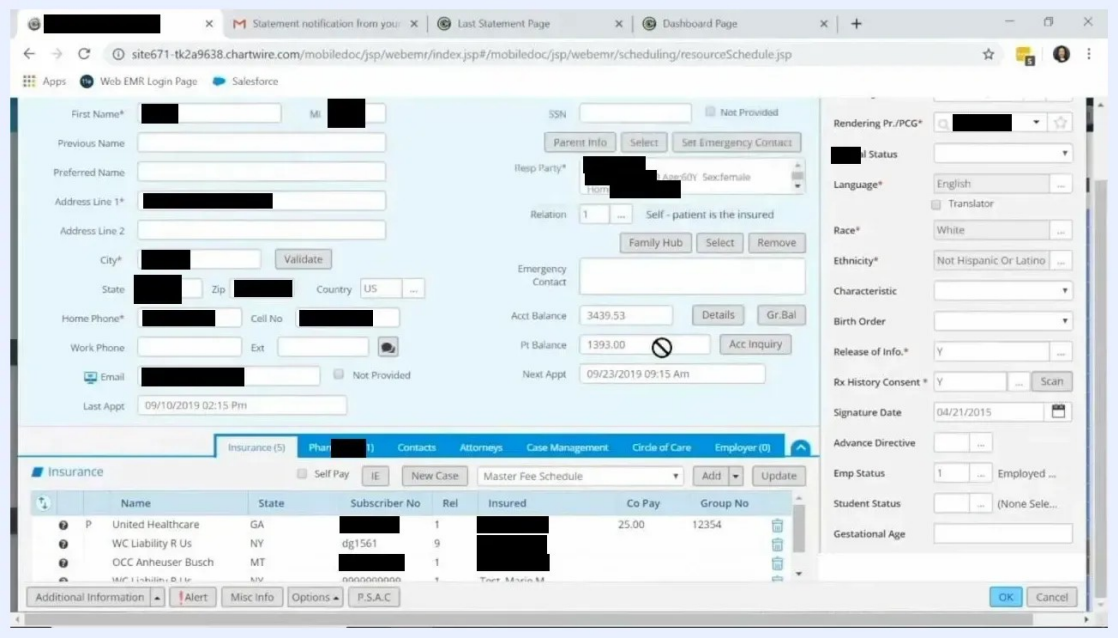


Options dropdown with Opt out of Paper Statement highlighted and checked

Step 6. Confirm the setting

Make sure **Opt out of Paper Statement** remains checked. The patient now receives electronic statements through the patient portal and not by mail.

To reverse this, uncheck the option so the patient receives paper statements again.



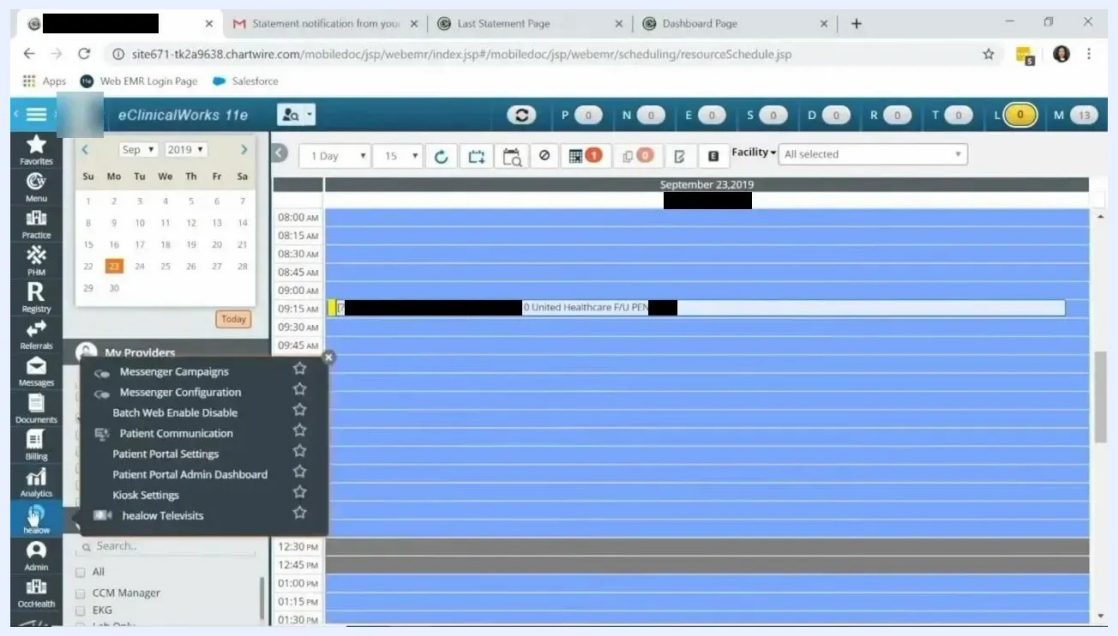
Patient demographic screen after opting out of paper statements

The patient can access and pay statements through the patient portal linked to eCW practice management. If the patient has a copay, account balance, or statement balance, the patient can pay it directly in the portal.

Part 2: Configure Patient Portal settings

Step 7. Open Patient Portal Settings

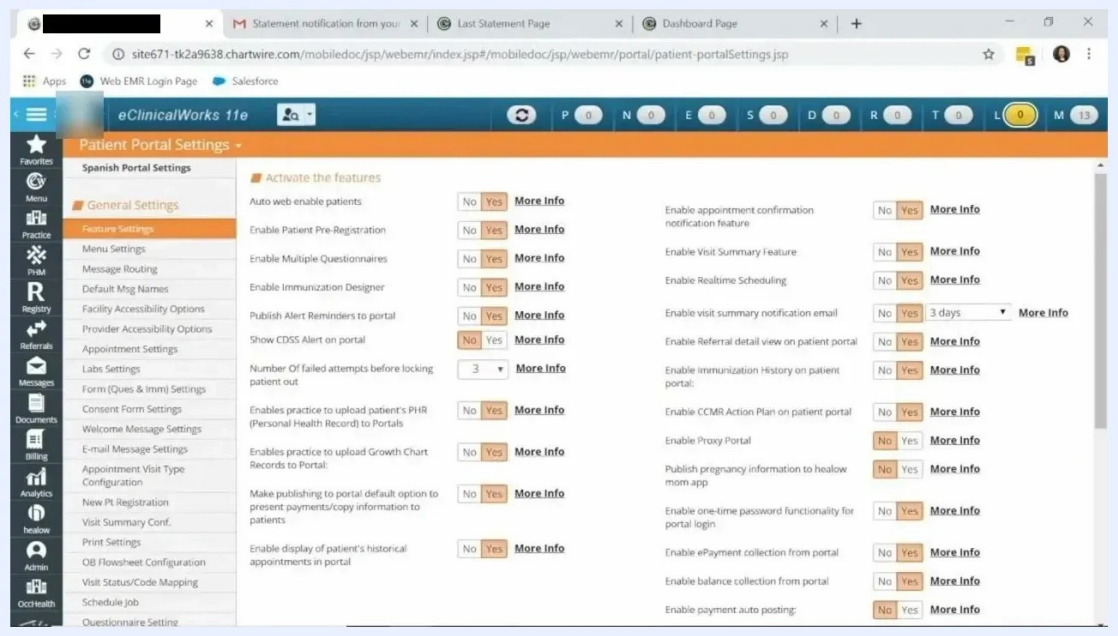
1. Return to the main scheduling or dashboard page in eCW and confirm you are on the correct date and provider schedule.



eCW scheduling page with the provider schedule and navigation sidebar visible

2. Click the menu icon in the vertical menu bar on the left side of the screen to expand the list of modules and settings.

3. In the expanded menu, click **Patient Portal Settings**. The Patient Portal Settings screen opens.



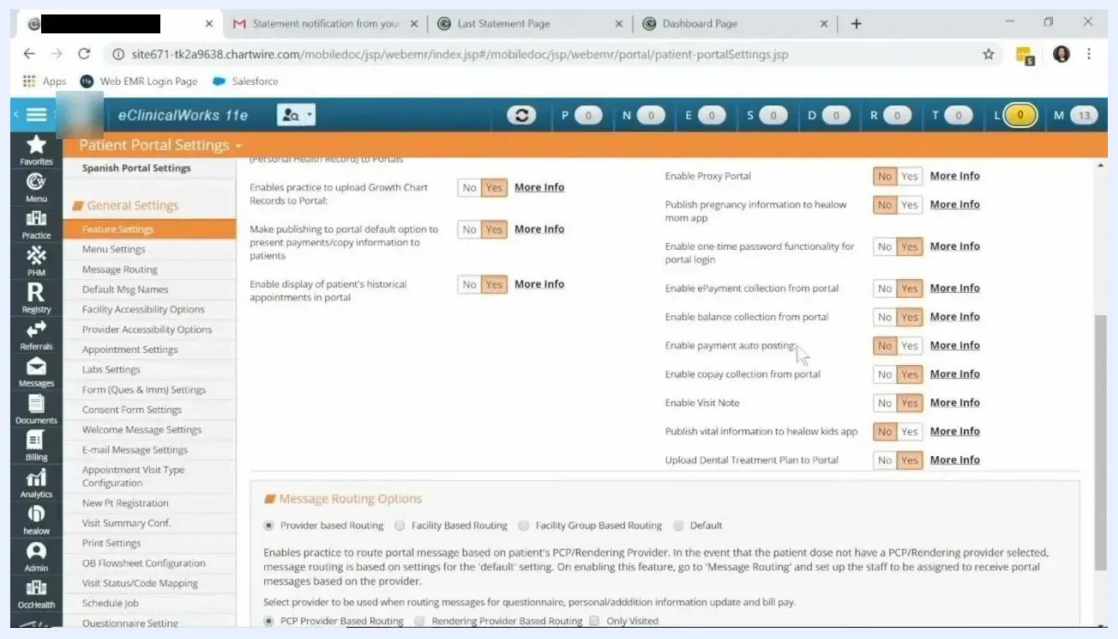
Expanded vertical menu bar showing options such as Messenger Campaigns and Patient Portal Settings

Step 8. Configure ePayment and balance collection

In Patient Portal Settings, go to **Feature Settings** under **General Settings** in the left sidebar. On the right side, set these options:

- **Enable ePayment collection from portal:** Yes
- **Enable balance collection from portal:** Yes
- **Enable payment auto posting:** No (recommended)
- **Enable copay collection from portal:** Yes, if you want patients to pay copays through the portal

With these settings, patients can pay balances and copays electronically through the portal. Payments are not auto-posted unless you enable that feature.

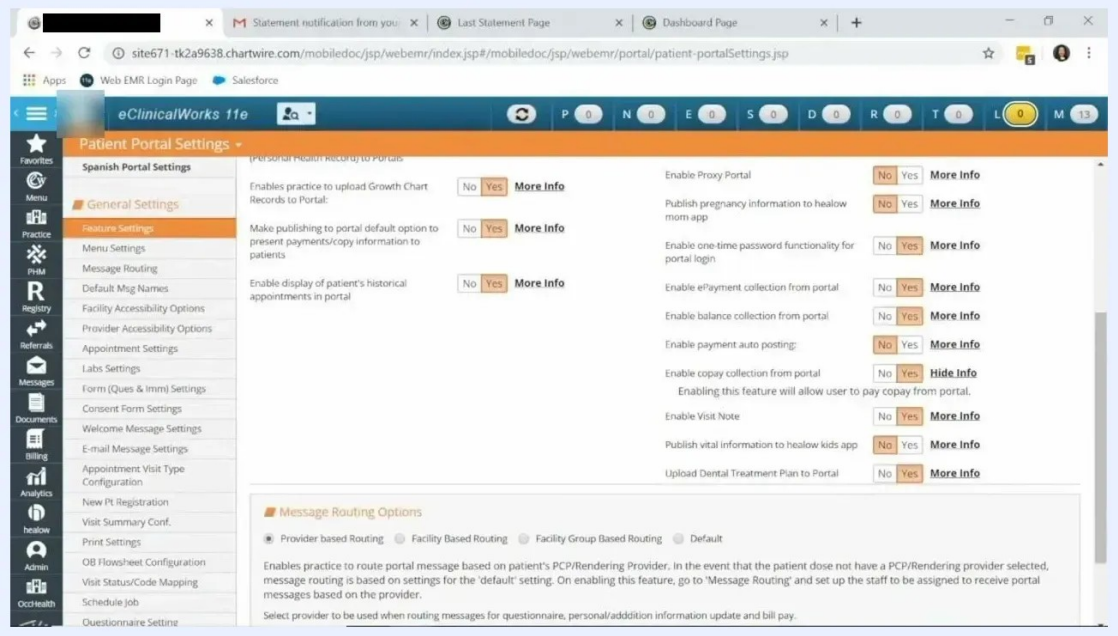


Patient Portal Settings screen showing Feature Settings with ePayment, balance collection, and auto posting options

Step 9. Save the Feature Settings

Scroll to the bottom of the Feature Settings section and click **Save** in the lower right corner.

Your changes do not take effect unless you save them.

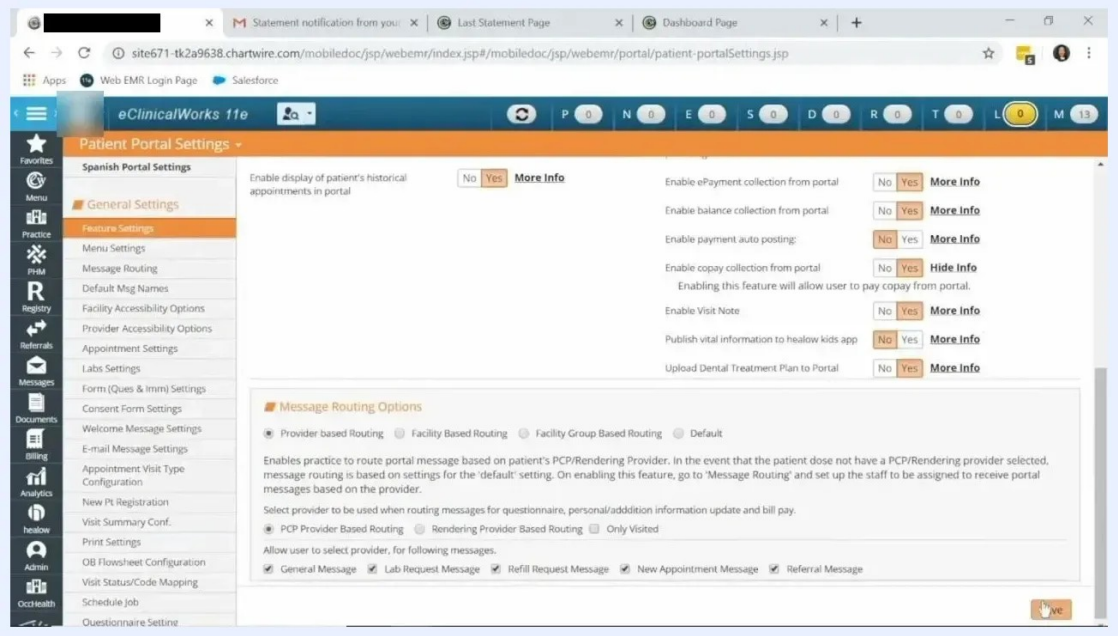


Save button highlighted at the bottom right of the Feature Settings section

Step 10. Set statement menu visibility

1. Under **General Settings** in the left sidebar, select **Menu Settings**.
2. In the **Customize Portal Menu Items** section, find the statement items:
    - **CURR_STMT (Current Statement):** Set to Yes to let patients view their current statement, or No to hide it.
    - **PAST_STMT (Past Statement):** Set to Yes to let patients view past statements.
3. Use the **Show/Hide** toggles to control visibility for each item.

4. Click **Save**.



Customize Portal Menu Items screen with toggles for Current Statement and Past Statement

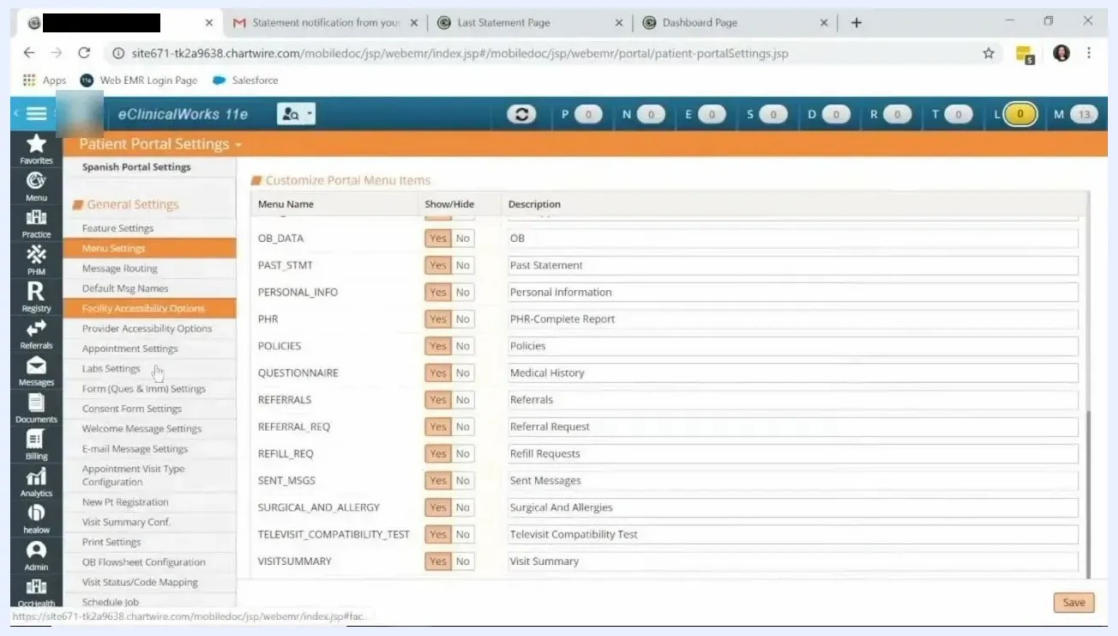
Step 11. Set up email notification preferences

1. In the left sidebar, select **E-mail Message Settings**.
2. In the **Email Settings** section, enable or disable each option as needed. In this setup, all are set to Yes:

    - **E-mail Appointment Reminders**
    - **E-mail Appointment Confirmations**
    - **E-mail Alert Reminders**
    - **E-mail Lab Published Information**
    - **E-mail Statement Information** (notifies patients by email when a new statement is available)
    - **E-mail New Message Information**
    - **E-mail Username, Password on Web Enabling**
    - **TeleVisit E-mail Reminder Appointment Notifications**
    - **TeleVisit E-mail Confirmation Appointment Notifications**

3. To configure details for an option, click the **Setting** button next to it.

4. Click **Save** at the bottom right.



Email Settings screen with toggles for appointment reminders, confirmations, alert reminders, and statement information

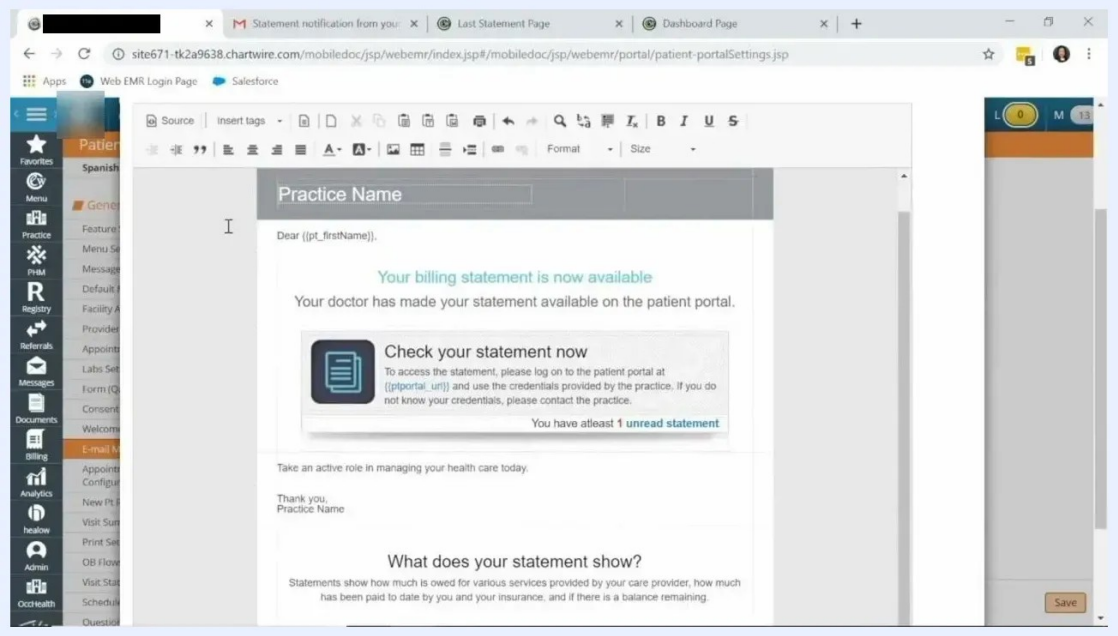
Part 3: Customize the statement notification email

Step 12. Open Statement Notification Settings

Open the **Statement Notification Settings** window in eCW. It contains an "email subject" field and an "email content" field.

- The subject field is editable and contains "Statement Reminder" by default.
- The content field holds a template with placeholders such as "Practice Name" and {{pt_firstName}}.

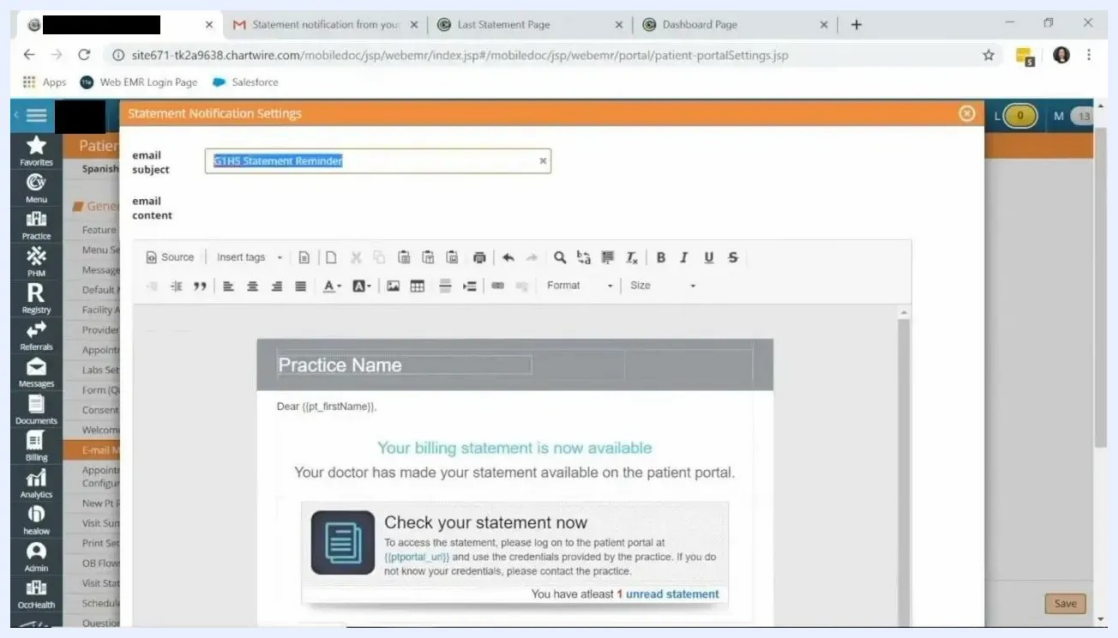
- The template tells the patient that their billing statement is available and links to the patient portal.



Statement Notification Settings window with an editable subject and email template showing placeholders

Step 13. Enter a custom subject

Enter any subject line that fits your practice. In this example, "G1HS Statement Reminder" is entered in the subject field.



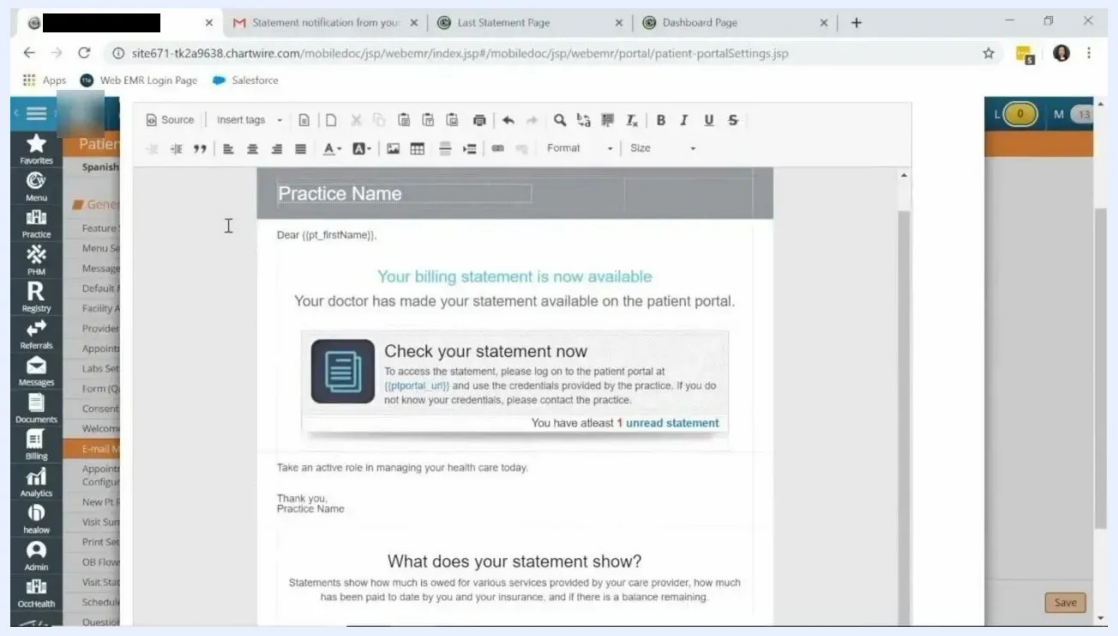
Subject field with "G1HS Statement Reminder" highlighted and the email template visible below

Step 14. Review and customize the email content

The email template includes:

- The Practice Name (editable)
- A greeting with the patient's first name placeholder
- The notification "Your billing statement is now available"
- Instructions to check the statement through a portal link (for example, {{ptportal_url}})
- A statement summary: "You have at least 1 unread statement"
- Additional information about managing healthcare and what the statement shows

Make sure the link and placeholders are correct for your practice.



Full email template including the statement link, summary, and additional explanation

Step 15. Save your changes

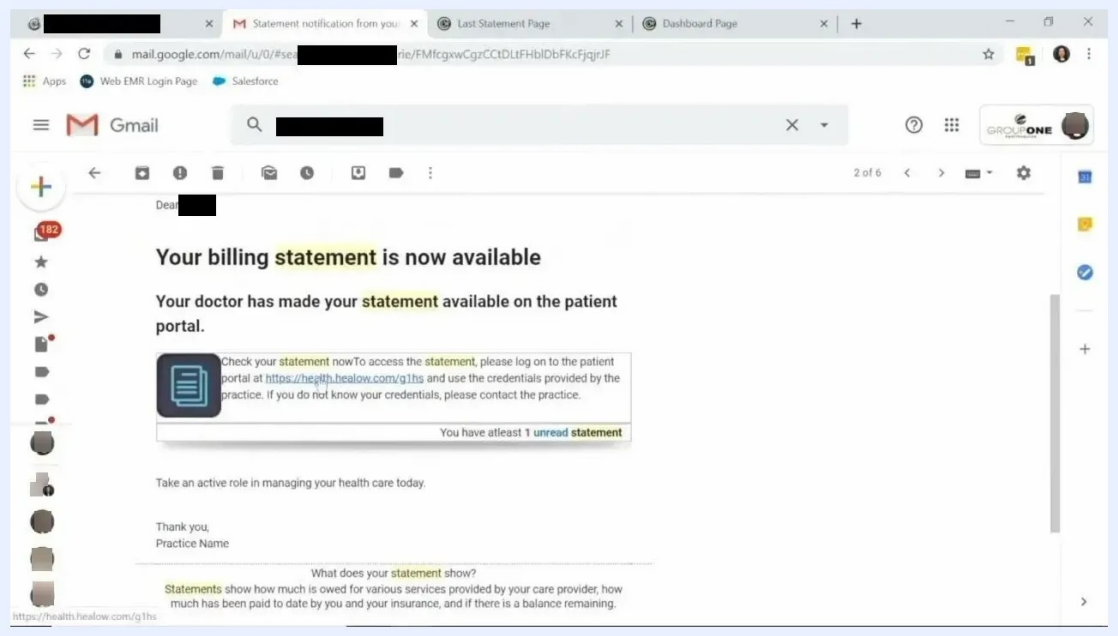
Click **Save** at the bottom right of the settings window.

Step 16. Verify the notification email

Open the recipient's email inbox (for example, Gmail) and find the email with the subject you configured, such as "G1HS Statement Reminder". The email shows:

- A personalized greeting (for example, "Dear Marie,")
- The notification "Your billing statement is now available"
- The portal link (for example, https://health.healow.com/g1hs)
- The summary "You have at least 1 unread statement"

- Additional information about statement details and managing healthcare



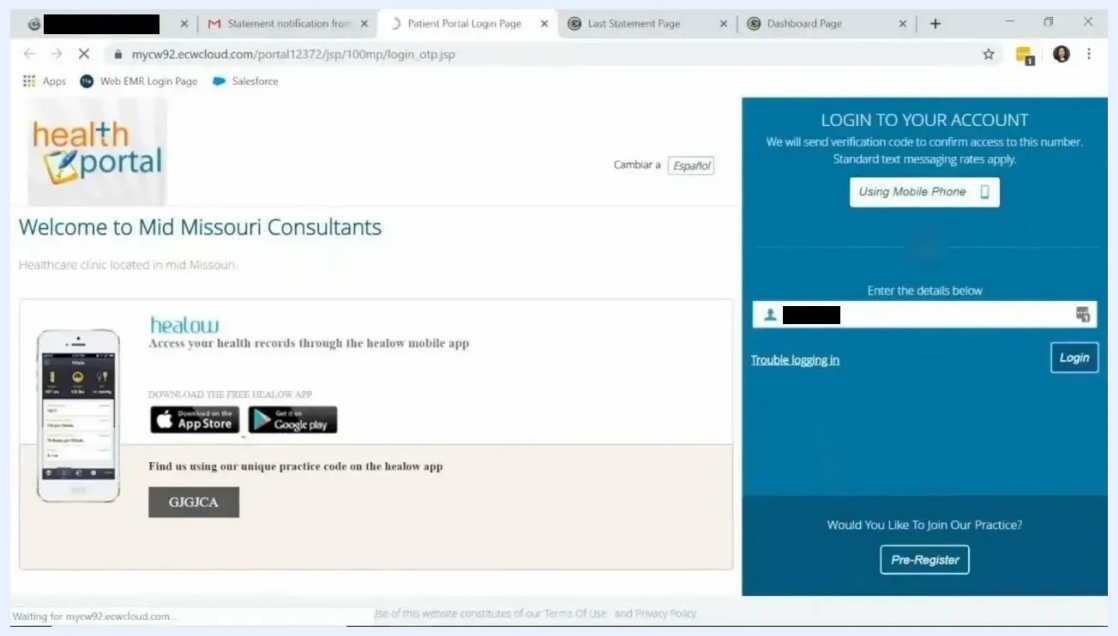
Gmail inbox showing the received statement notification email with personalized content and portal link

Part 4: Review and pay a statement in the patient portal

Step 17. Log in to the patient portal

1. Go to the portal URL (for example, mycw92.ecwcloud.com/portal12372/...). The page shows the "health portal" logo and a welcome message for "Mid Missouri Consultants."
2. In the **LOGIN TO YOUR ACCOUNT** panel on the right, enter the username (for example, marietest). You can log in with a mobile phone or by entering credentials. The page also offers **Trouble logging in** and **Pre-Register** for new users.

3. Click **Login** after entering your credentials, and wait for the dashboard to load.



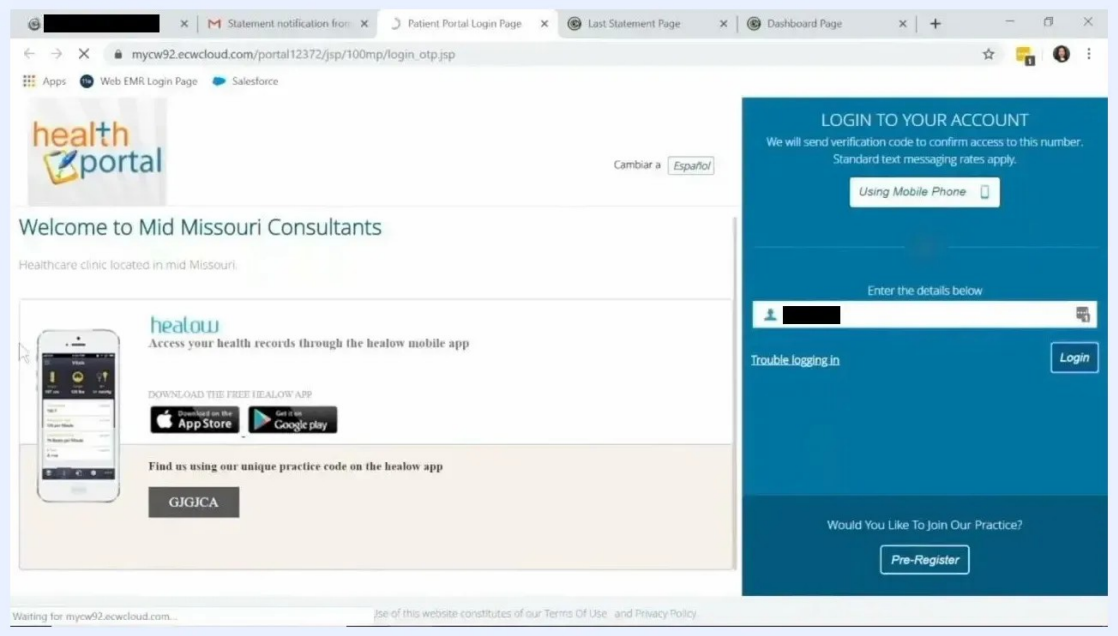
Patient portal login page with the username marietest entered, login options, and a welcome message for Mid Missouri Consultants

Step 18. Review the dashboard

The dashboard displays several panels:

- **Appointments:** Current appointments, including provider name, date (for example, 09/23/2019), and time (10:15 AM EDT).
- **Copay:** The copay amount (for example, $25.00) and a **Pay Copay** button.
- **Messages:** Unread messages (for example, 5 unread) with feedback requests and dates.

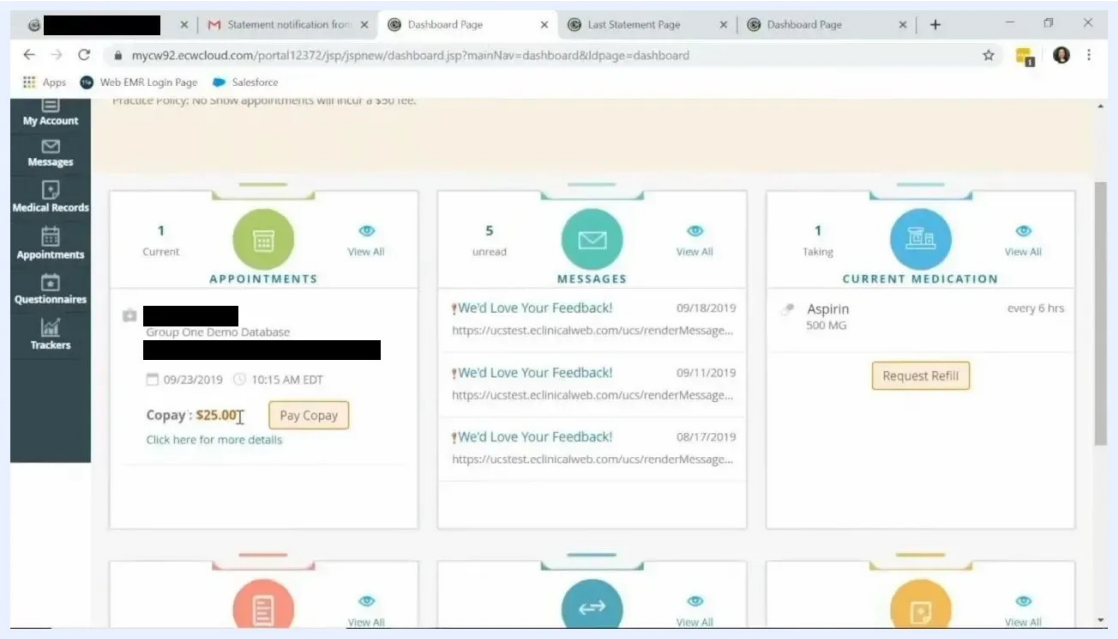
- **Current Medication:** Active medications (for example, Aspirin 500 MG, every 6 hrs) and a **Request Refill** button.



Patient portal dashboard showing appointments, a $25.00 copay, messages, and current medication

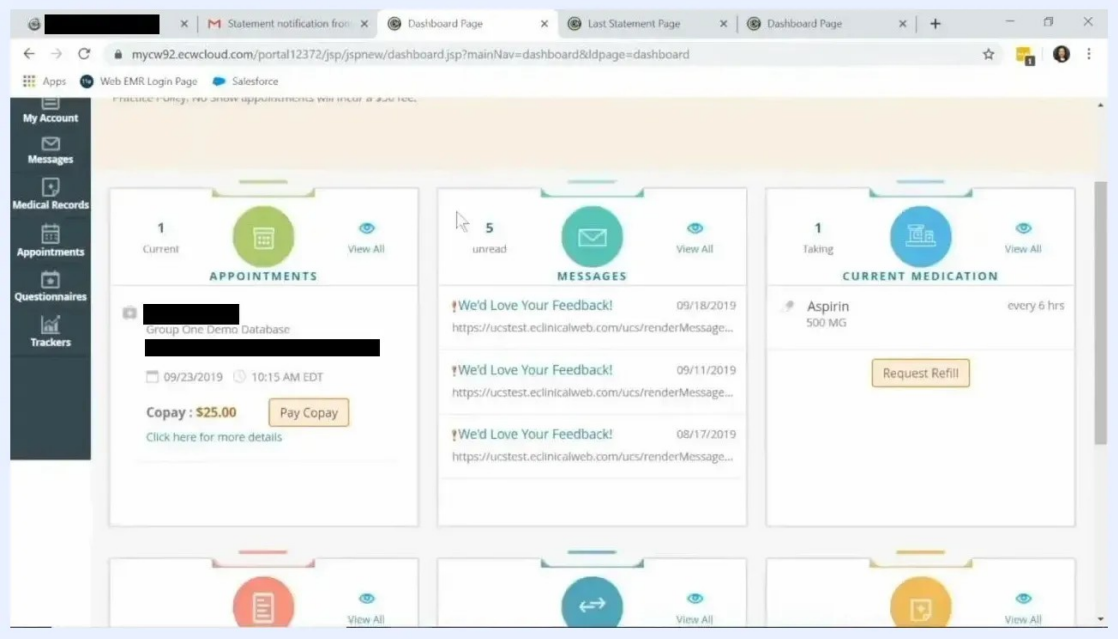
Step 19. Handle a payment error

Click **Pay Copay** next to the copay amount. If there is a browser or system issue, you may see this message: "An error has occurred. Please try again later. Thank you." This indicates a temporary problem with the payment system.



Error message after clicking Pay Copay: "An error has occurred. Please try again later. Thank you."

You can use any browser, such as Chrome or Mozilla, to access the portal. Return to the dashboard, which remains available for reviewing appointments, messages, and medications.



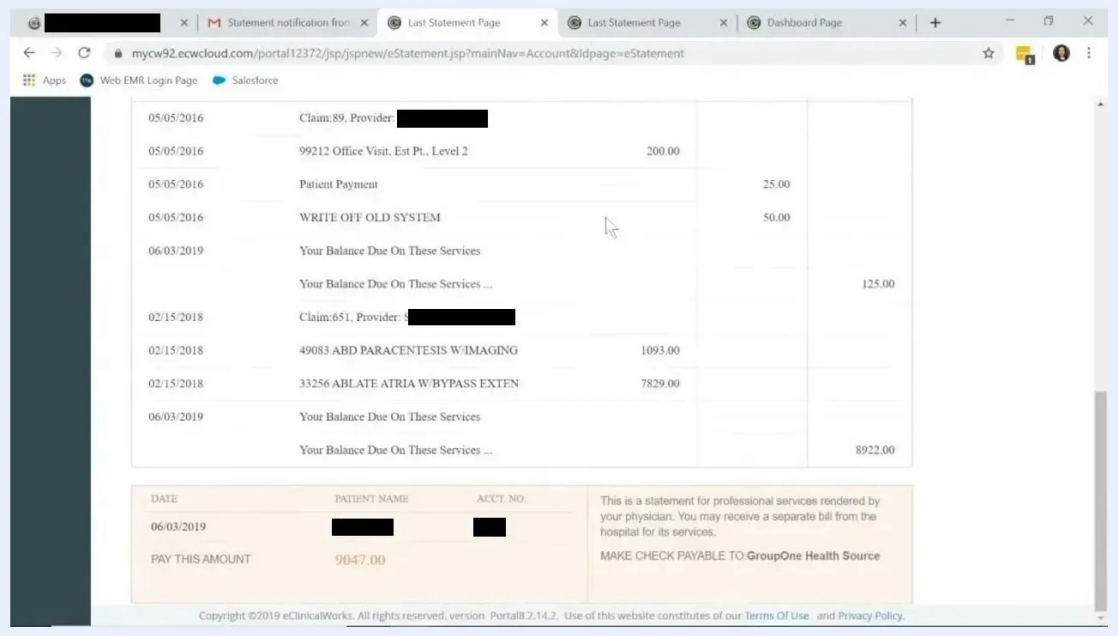
Dashboard view with the appointments, copay, messages, and medication panels

Step 20. Review your latest statement and balance

Find the **Latest Statement** panel on the dashboard. It displays:

- A prompt to check your latest statement
- The Bill Date (for example, 06/03/2019)
- A **See Statement Details** button
- The Account Balance (for example, $1,393.00)

- A **Pay this bill** button



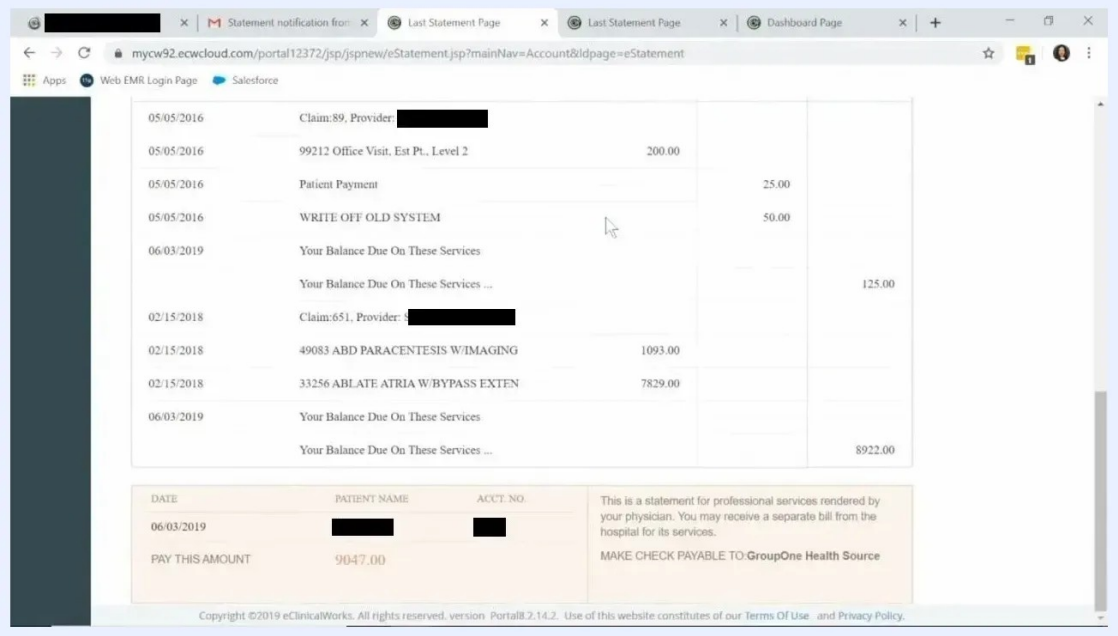
Latest Statement panel showing the bill date, account balance of $1,393.00, and payment button

Step 21. Open the statement details

Click **See Statement Details** or **Pay this bill** to open the statement summary. The **Past Statement** page displays:

- A **Billing Summary** with patient details (for example, Name: Marie M Test, Bill Date: 06/03/2019, Account: 9119)
- Address information
- A Card Information section for entering payment details (Master Card, Visa, Discover)

- An option to print the statement



Past Statement page with the billing summary, patient details, and card information section

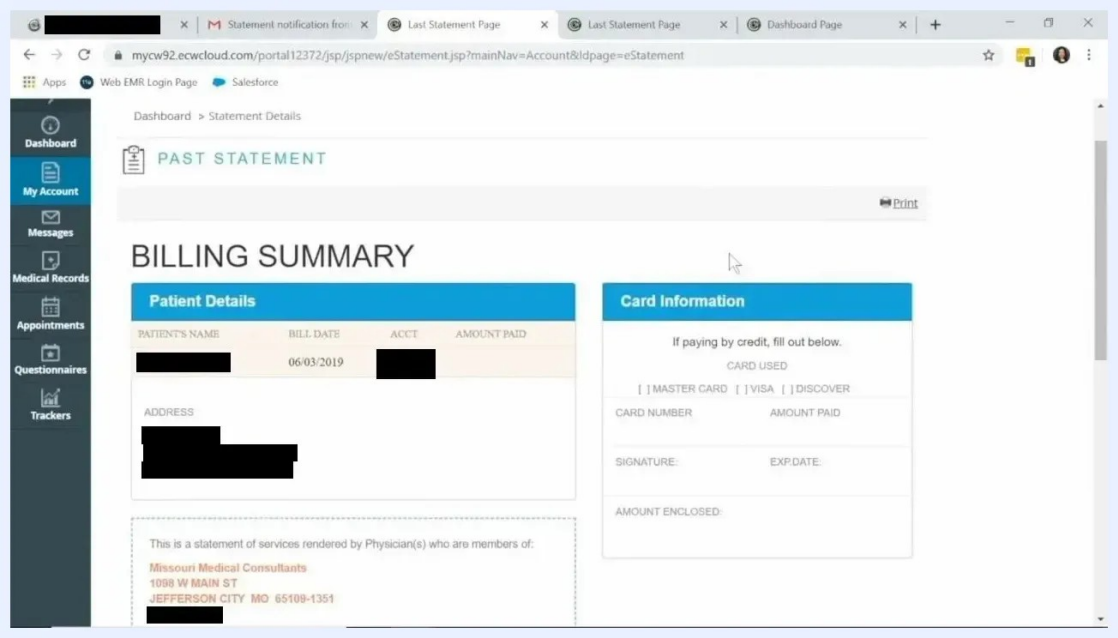
The statement lists all relevant transactions:

- Service dates, providers, procedure codes, and amounts (for example, 99212 Office Visit, $200.00; Patient Payment, -$25.00; Write Off, $50.00)
- Balances due for various services and claims
- Total due amounts for specific dates (for example, 06/03/2019: $8,922.00)

At the bottom, the summary shows the date (06/03/2019), patient name (Marie Test), account number (9119), "PAY THIS AMOUNT: 9047.00", and payment instructions such as "MAKE CHECK PAYABLE TO: GroupOne Health Source".

Step 22. Print or save the statement

Click **Print** on the statement summary page. In your browser's print dialog, print the statement or save it as a PDF or Word document for your records.



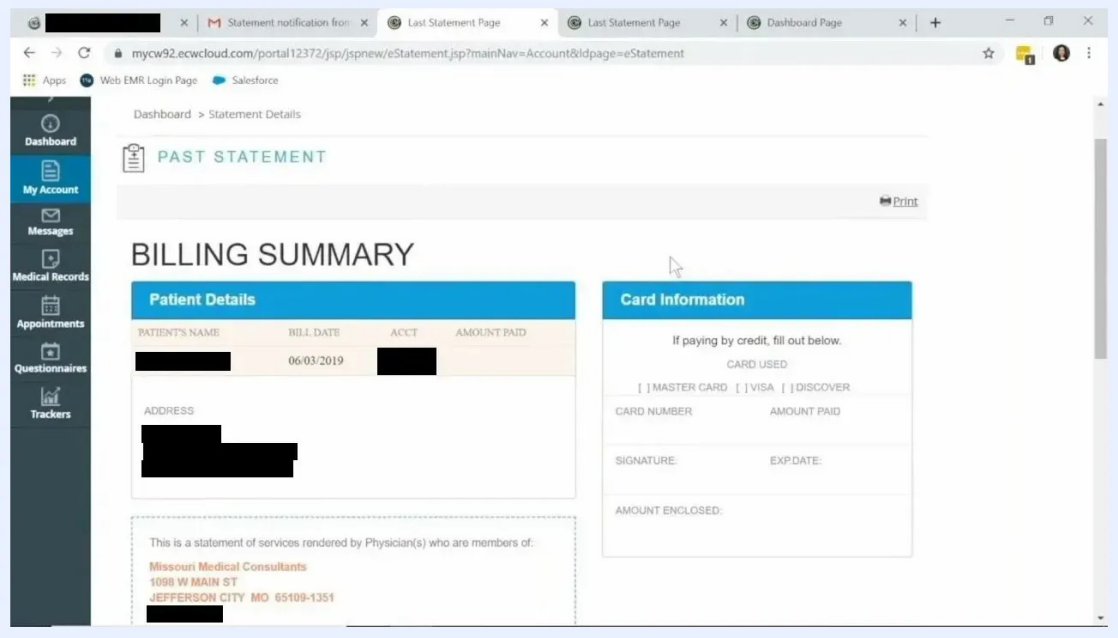
Statement summary page with the print option and billing details

Step 23. Pay your bill by credit card

On the **Past Statement** page, find the **Card Information** section to the right of the **Billing Summary**. It accepts Master Card, Visa, and Discover. Complete these fields:

- Select the card type by checking the appropriate box.
- Enter your card number in **CARD NUMBER**.
- Enter the amount you want to pay in **AMOUNT PAID**.
- Provide your signature in **SIGNATURE**.
- Enter the card's expiration date in **EXP. DATE**.
- Optionally, enter the total amount enclosed in **AMOUNT ENCLOSED**.

Check that all information is accurate before you submit your payment.

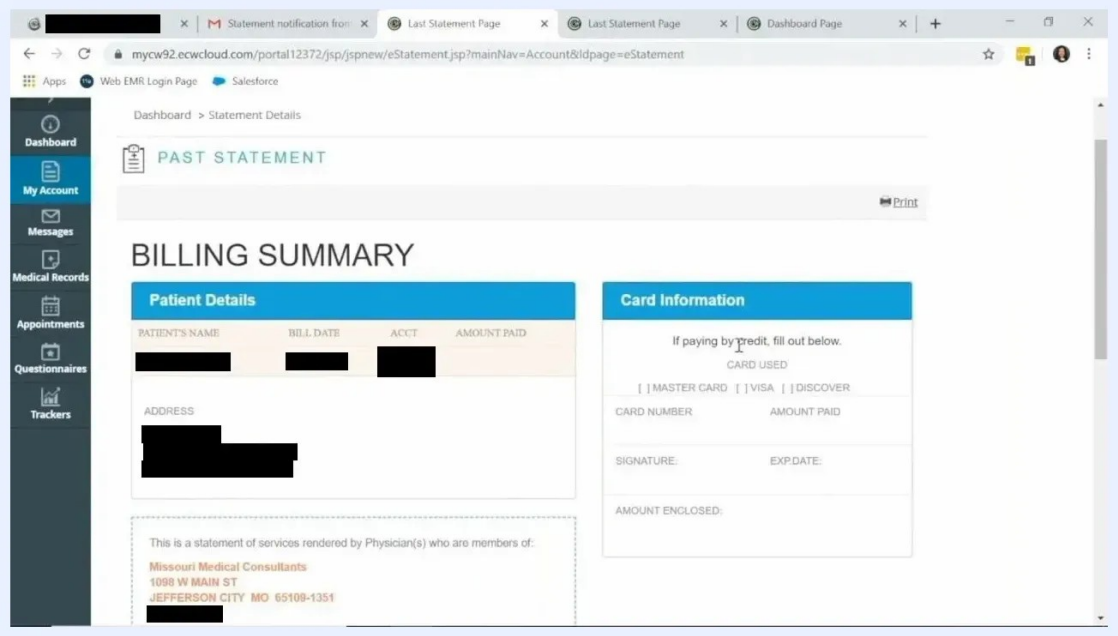


Billing Summary and Card Information section with fields for card type, number, amount, signature, and expiration date

Step 24. Complete your payment

After you enter your credit card details, follow any on-screen prompts to submit the payment. If you need a printed copy for your records, use **Print** at the top right of the statement page.

When the payment is complete, you can log out or return to the dashboard to review your account status.



Billing Summary and Card Information section at the end of the payment process, with the print option visible

Summary

To set up patient statements in eClinicalWorks, you complete these tasks:

- Search for and select the patient, open demographics, and use **Options** to select **Opt out of Paper Statement**.
- Enable and save payment and copay collection in **Feature Settings**.
- Set visibility for current and past statements in **Menu Settings**.
- Enable and configure email notifications in **E-mail Message Settings**.
- Customize and save the statement notification email, then verify delivery.

Patients can then log in to the portal, review appointments, copay, and statement balances, print statements, and pay by credit card. If a payment error occurs, retry later or use a different browser.

What's next

- Send a test statement notification to a test patient to confirm the email subject, content, and portal link.

- Log in to the portal as the test patient and confirm that the current and past statements appear.
- Review **E-mail Message Settings** to confirm that every notification you want is enabled.