EZLINK

Set up process

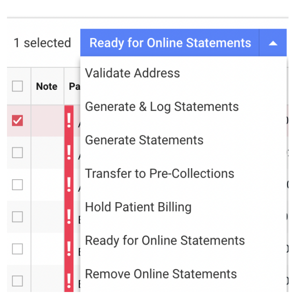
- ➔ Click practice
- ➔ Click online statements
- ➔ Can set up when its due
- ➔ Can add a message to the statement
- ➔ Need to add a responsible person at the clinic to receive a message if any of these do not go through
- ➔ Set the time they go out
- ➔ Save

Sending

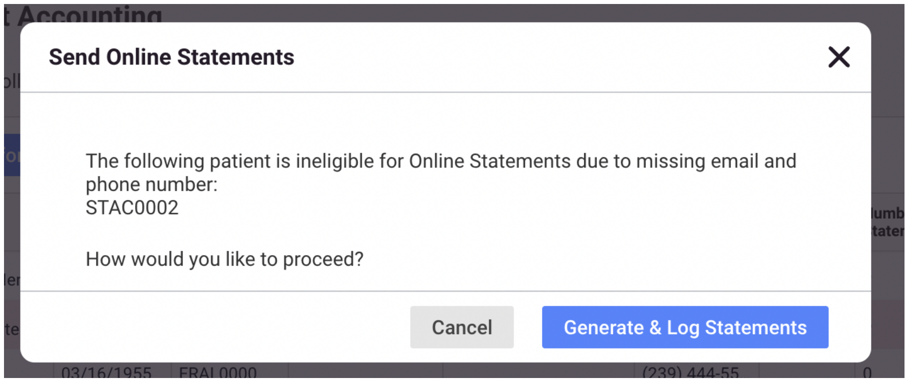
- ➔ Click on billing
- ➔ Click on patient accounting
- ➔ Filter by eligible for online statements
- ➔ Has to have *mobile and email address*
- ➔ Select all of the people you would like to send out the statement for
- ➔ Click the Action drop-down
- ➔ Click “ready for online statement”
- ➔ A new tab on this screen will show you who received an online statement

Removing online statement

- ➔ Can remove the statement before is set to go out from the settings
- ➔ Click the person you would like to remove
- ➔ Click the action drop down
- ➔ Click remove online statement



Please note that if you do not filter for "eligible for online statements" you can still send these out, you will just get a pop-up and can switch over to paper statements for those who do not meet the requirement of mobile and email address in demographics



<u>For Square users</u>

Payments will automatically, be linked to the outstanding balance in the patient's financials

<u>For NON-Square Users</u>

- ➔ The patient will not be able to pay via invoice, they will have to manually mail payment, or call the office to pay the balance from the invoice. Or if the office uses an online bill pay option they can add that to the notes in the setup and the patient will be able to click that link to pay the bill.
- ➔ The office will then need to manually post the payment