INSTRUCTIONS: PATIENT STATEMENTS SETUP FORM	
NOTE: Fields indicated with an asterisk (*) are **required**.	
Section 1: General Information	
*** Frequency of Transmissions**	Indicate how often you will transmit statement files. Please only select ONE option.
*** Anticipated quantity per transmission?**	Indicate the total number of statements you anticipate sending per transmission.
*** Auto-Release Option**	Indicate whether you want your statement files to be automatically released within 30 minutes of file receipt OR if you wish to manually release the files to be printed after you have reviewed them under your statements account.
*** Software Used**	Indicate the type of software used to create the statement file.
Section 2: Statement Information	
*** Sub Account of**	Indicate whether the entity requesting statements is a sub account under a main client account with i-Plexus. (E.g, a single practice under a billing service account)
*** Entity Name**	Indicate the name of the facility that should appear in the top left corner of the statement. This should be the entity that the statement is from.
*** Return Address**	Indicate the address for the entity to receive any statements that are returned.
*** Remit To Address**	Indicate the address for the entity where payments should be sent. This is the address in the right-middle of the statement.
*** Bottom of Statement Address**	Indicate the address for the entity to appear at the bottom of the statement.
*** Phone/Toll Free Number**	Enter the phone number and/or Toll Free number for the facility for use if the receiver of the statement has questions regarding the statement.
*** Tax ID**	Enter the identification number you are credentialed under for tax purposes.
Credit Cards Accepted	Indicate which credit cards are accepted for payment or if none are accepted. It will be assumed as 'none' if this field is blank.
Business Hours	Indicate whether you wish to have your business hours printed on the statement and if so, what those business hours are. It will be assumed as 'no' if these fields are blank.
Account Number in Bill-To window?	Indicate whether you wish to have the account number for the statement balance displayed in the Bill To window of the outgoing envelope.
Do not print bills less than?	Indicate if you do not wish to have statements printed/mailed for dollar amounts that are equal to or less than a specific dollar amount.
Logo?	If you wish to have your company logo printed on the statement, please indicate this by selecting yes and include an electronic copy of your logo with this setup form.
*** Section 3: Signature**	
This section is required. A signature (either electronic or hand written) must be received on the setup reflecting that you agree to the terms of the setup form. We cannot process your setup if this section is incomplete.	

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Additional Information

The Patient Statements setup turnaround time may vary depending on the special needs of each client account. The standard turnaround time frame for new account setup is between 3-7 business days. The following instructions and time frames are intended to be used as a guide and will help ensure a smooth and speedy setup process for your account. Please note: timeframe to begin setup process is assuming customer already has existing account in our system for other processes (e.g, claims, eligibility, etc).

Initiate Setup Process

1. Customer should submit executed Patient Statements Contract (if one is not already on file at i-Plexus for this account request) and 'New Client Setup Form' to our Implementations Department via email or fax.
2. Customer should begin to prepare a test file containing their patient statements

Within 24 Hours (from receipt of contract/setup form)

3. Implementations Rep will notify customer of receipt of contract and/or setup form
4. Implementations Rep will provide customer with their contact information should the customer have any questions during the setup process
5. Implementations Rep may ask questions to clarify information submitted on the setup form
6. Implementations Rep will request Test File (note: customer must notify i-Plexus that test file has been submitted)
7. Accounting will generate invoice for Patient Statements Deposit and provide to customer via fax or email (if customer does not have access to fax or email, we will mail invoice)

Within 24 Hours (from receipt of test file)

8. Implementations Rep will notify customer of receipt of test file
9. Mapping of the test file will begin

Within 3 Business Days (from receipt of test file)

10. Implementations Rep will notify customer with status on the mapping and creation of the patient statement 'sample' OR will provide customer with patient statement 'sample' to review/approve.
11. If 'sample' is provided to customer, customer must sign/approve and fax or email to i-Plexus

Within 7 Business days (from receipt of test file)

12. Implementations Rep will provide customer with patient statement 'sample' to review/approve if it has not already been completed at an earlier time.
13. If 'sample' is provided to customer, customer must sign/approve and fax or email to i-Plexus

Within 24 Hours (from receipt of signed/approved sample from customer)

14. Implementations Rep will notify customer of receipt of sample
15. Implementations Rep will begin account activation process

Within 48 Hours (from receipt of signed/approved sample from customer)

16. Implementations Rep will notify customer of account production status

General Setup Notices

- An executed Contract, the *Client Setup Form* and a test file must all be received before setup process can begin
- If the customer does not receive confirmation of receipt of the Contract, the *Client Setup Form* and/or the test file within the specified time frame, they must contact i-Plexus to ensure there was not an issue receiving the required data.
- Customer must write the invoice number on their patient statements deposit check to prevent delays in processing their payment
- The deposit must be received before i-Plexus can move the account into production status
- Customer must fax or email signed/approved 'sample' (a.k.a, 'proof') to i-Plexus before i-Plexus can proceed with moving the account into production status
- Format changes after initial mapping is completed and statements 'sample' is provided to the customer will extend the time frame for account to be placed in 'production' status. The amount of the delay will be dependant upon the complexity of the changes requested.

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PATIENT STATEMENTS SETUP WORKFLOW