

Statement Manager



Physician bills and health care statements can be confusing. Without a clear statement, patients may not know which services to pay for, the amount due and whom and when to pay — resulting in delayed revenue.

Create professional, easy-to-read patient statements

Optum[®] Statement Manager increases self-pay collections and improves the patient experience by producing attractive and easy-to-read statements that clearly indicate patient obligation. With Optum Statement Manager, you can:

- Save on administrative costs by reducing questions to the call center.
- Reduce production costs associated with paper statements.
- Receive timely and accurate reimbursement.

Flexible formatting and page layout

Optum Statement Manager uses Microsoft Word as the statement design tool, offering you great flexibility in formatting and page layout. Individual statements printed or viewed on the screen are formatted exactly as the statement sent to the patient. Statement Manager facilitates postal savings for high-volume production through transmission of an output file to your print vendor of choice.

Access online statements

With the electronic bill presentation and payment (EBPP), statement view, credit card payment and remit filing, components can now be accessed via a link on your existing e-commerce patient portal. Optum can also help you develop a web portal to access online statements.



Optum Statement Manager creates clear patient statements that encourage prompt payment.

Patient-friendly billing enhances patient care

A clear statement encourages prompt payment, reduces calls and improves self-pay A/R days. Many patients wait to pay until they are certain that they have a final bill. By the time they receive a bill, they may not remember the visit. A good statement closes the loop of clinical care by providing a clear, concise, patient-focused communication of the balance owed. And, if the patient does call for information, customer service staff needs to have online access to statement information to provide quick and accurate responses to patient questions and concerns.

Software functionality

Optum Statement Manager compiles patient statement data from the practice management system, deriving the accounts that require a statement from the statement index (used to identify accounts and dunning levels only). The specific data to be detailed or summarized, and the order in which the data are presented on the statement, are determined using logic that can be tailored via Statement Manager configuration options.

During the compilation process, data is collected and stored. A sort index is created during the printing process along with a report file for reporting. Since all of the data are stored, the statement data remain static so that production printing and demand reprinting of prior statements will produce identical statements. Changes made to the data in the practice management system will not affect the statements after the compilation process is completed.

The demand statement print process consists of two components: the Print Manager and the Print Processor running on the Optum Statement Manager server. The Print Manager pulls a single statement from the print queue, collects and formats the data for that statement, and passes it to the Print Processor. The Print Processor merges the data into the Microsoft Word statement template and prints the statement on the selected printer or saves the statement to a file, if this option is selected.

Production statements are written to a structured file as defined in the configuration options. The print fulfillment vendor collects the file, renders the format and the data, and processes the documents for mailing. If a statement run is to be printed in house, the documents are printed to file and stored in folders according to run and page length, thus providing a mechanism for sorting statements by page length, ZIP Code™ Lookup and patient name, in that order.

Clear statements improve collections and enhance the patient experience.

For more information:

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