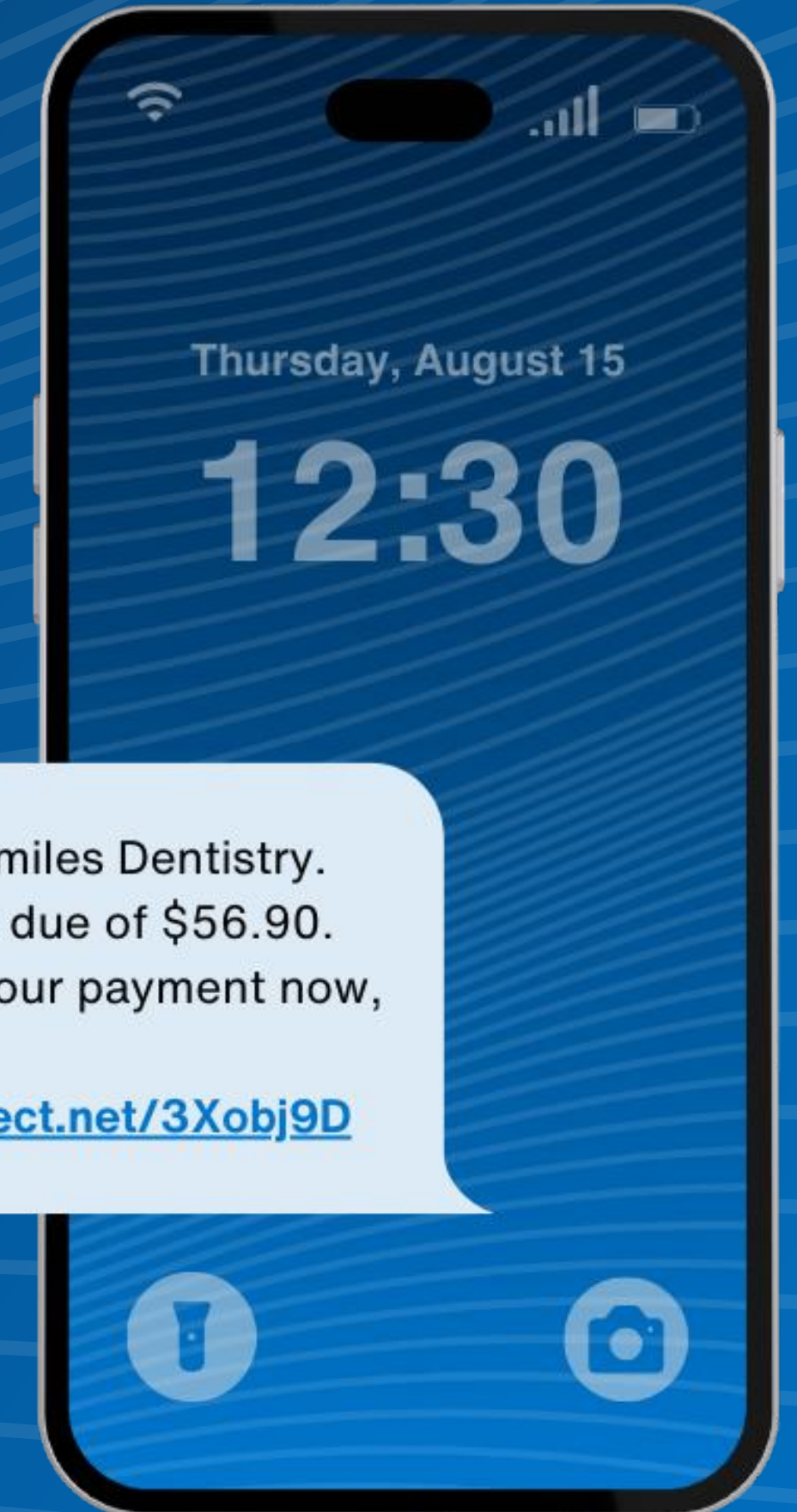


# Bulk Text-to-Pay Feature Guide



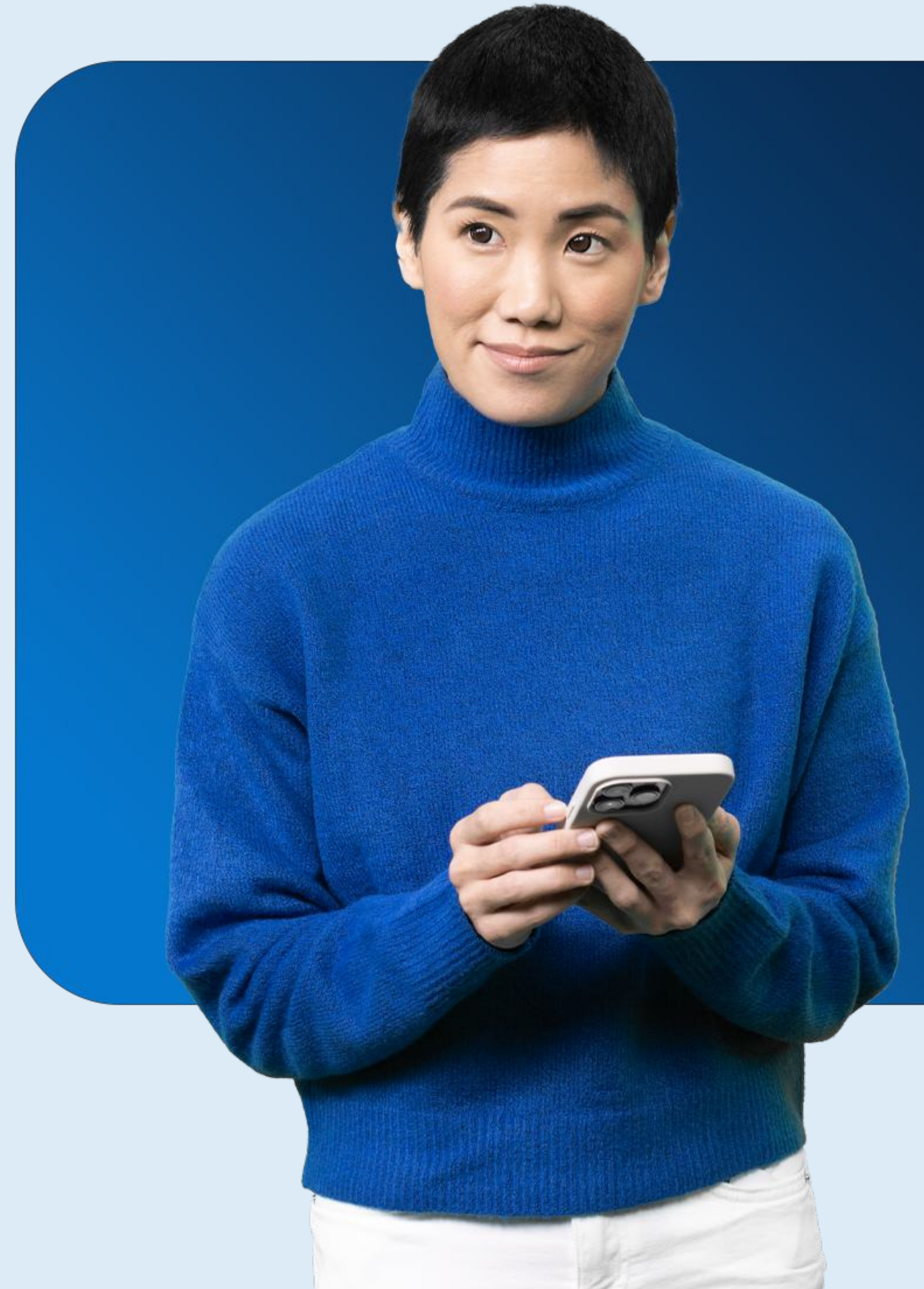
# Introduction

**Text-to-Pay is a popular payment method offering convenience, speed, and security for both practices and patients.** This feature simplifies payments by sending patients a text message with a link to pay online on your Balance Collect site. Text-to-Pay efficiently collects balances and can also be used on-site to deliver invoices and accept payments.

## Did you know?

Text message reminders are read within minutes of receipt, with an open rate of **over 90%**.

Bulk Text-to-Pay makes sending Text-to-Pay messages easier than ever by allowing practices to reach a wide audience simultaneously. This significantly reduces the workload for payment collection, boosting staff morale and productivity, while empowering patients to pay how they want to pay.



# Benefits of Bulk Text-to-Pay

## **Instant and consolidated outreach**

Reach all patients with outstanding balances immediately, and then track delivery status and payments with live reports.

## **Lifted response rates**

Text messages boast significantly higher open rates than most communication channels. When more patients see payment requests, more patients can settle their outstanding balances.

## **Improved patient relationships**

Payment collection can be stressful for all parties involved. Providing patients with a straightforward, convenient way to pay can improve patient satisfaction.

## **Reduced collection costs**

Traditional debt and billing collection methods eat away at your practice's budget. Automated text solutions offer a cost-effective, high impact solution.

## **Accelerated collections**

Text reminders create a sense of urgency. Research shows that 32% of people will pay their bill in less than five minutes when they receive it via secure text.

# How to Use Bulk Text-to-Pay in Bridge™ Payments

Bulk Text-to-Pay enables you to send payment requests to multiple patients at once in just a few simple steps.

1. In the left menu, click **Balance Collect > Send Payment Requests**
2. Prepare the message on the **Create Message** screen.
  - a) Select the Balance Collect site to insert into the message (if your organization has more than one).
  - b) Specify who the message is from, using the location name that your patients will recognize.
  - c) Include or exclude your billing phone number (including your phone number offers patients a quick way to contact you with questions).
  - d) Include or exclude the amount due (including the amount due pre-fills the payment amount in your Balance Collect site when patients open the link for easy and accurate payments).
  - e) Click **Continue**.

Send Payment Requests

Create Message Required Field\*

1. Select Balance Collect Site \*

Demo Haven

2. Who's the message from? \*

DHH Danbury

3. Would you like to include your billing phone? \*  Yes  No

800-437-8585

4. Provide amount due? \*  Yes  No

**Message Preview**

Hello from DHH Danbury. You have a balance due of [AmountDue]. Questions about your account? 800-437-8585. To securely make your one-time payment now, please click here [payment\_link].

**Continue**

# How to Use Bulk Text-to-Pay in Bridge™ Payments

3. Upload recipients on the **File Upload** screen.
  - a) Download a template to input your recipient information into (using a template ensures you upload all necessary recipient information).
  - b) Enter or paste information into each of the columns.
  - c) Save the file with a unique name.
  - d) On the **File Upload** screen, click **Select File** to upload the prepared file.
  - e) Click **Send Payment Requests** to send the Bulk Text-to-Pay messages.

The screenshot shows the 'File Upload' interface. At the top right is a link to '← Back to Create Message'. Below the title, there is a section 'Choose your template and download' with two download links: 'Template\_file.csv' and 'Template\_file.xls'. Underneath is the 'Upload Your File' section, which includes a 'File Upload \*' label and a text input field containing the filename 'PatientBalances\_BulkTexttoPay\_7.26.24.csv'. To the right of the input field is a blue 'Select File' button. Below the input field, it states 'Accepted file types: .xls, .csv' and 'Max file size: 5 MB'. A disclaimer reads: 'By clicking "Send Payment Requests", you are confirming that you want to send the messages to recipients in uploaded file.' At the bottom right is a large blue 'Send Payment Requests' button. A 'Required Field \*' label is positioned to the right of the 'Upload Your File' section.

# How to Use Bulk Text-to-Pay in Bridge™ Payments

## What Happens Next:

When the file upload begins processing, you are taken to the **File Upload History** screen (**Payment Requests > Upload History**), where you can see the status of your Bulk Text-to-Pay file upload.

The status options are:

- + **Processing:** File is uploading.
- + **Requests Sent:** Bulk Text-to-Pay messages were successfully sent.
- + **Failed:** Error found in file and no text messages were sent. See the “Rules for Successful File Upload and Processing” section for more information.

The screenshot shows the 'File Upload History' interface. At the top, there are four input fields: 'File Name', 'Upload Date', 'User Name', and 'Status'. The 'Status' field is a dropdown menu. To the right of these fields is a 'Clear Filter' button. Below the input fields is a table with the following data:

File Name	Upload Date	User Name	Status	Details
PatientBalances_BulkTexttoPay_7.26.24.csv	07/26/2024 2:05 PM	pmbuser	Requests Sent	-

# Tracking Bulk Text-to-Pay Messages and Payments

After your Bulk Text-to-Pay file processes, you can view details about each sent Text-to-Pay message in Text-to-Pay Reports.

In the left menu, click **Reports**, and then select **Text-to-Pay Reports**.

Under **Transaction Reports – Text-to-Pay**, you can filter by message status, view details about payment amounts, and more.

Transaction Reports - Text to Pay

Show Message Status  Delivery Date(s)

Patient ID	Patient Name	Patient Phone Number	Date & Time Sent	Delivery Status	Balance Amount
555666	John Rectangle	(555) 555-5555	7/26/2024 2:05 PM EDT	Delivered	\$25.00



# Rules for Successful File Upload and Processing

- + File type must be .XLS or .CSV.
- + File cannot include more than 5,000 recipients and can be no larger than 5 MB.
- + File must have a unique name (not previously used).
- + The file name cannot include spaces, plus signs, commas, single quote marks, dollar signs, ampersands, semicolons, equals, or @.
- + Do not capitalize or change the spacing of the template column names.
- + Enter only numbers and one period for the decimal place in the **Amount Due** column. Dollar signs are not accepted.
- + Do not enter extra spaces in any of the cells.

## Tips

- + For multi-location practices: Because you can select one Balance Collect site per batch of Bulk Text-to-Pay messages, you should organize patients into separate file uploads according to their location/Balance Collect site.
- + Including your phone number in Bulk Text-to-Pay messages will make it easier for patients to contact you via phone. Include your number if you think patients will have questions. For routine payment requests, it is optional.
- + Including the balance due in Bulk Text-to-Pay messages facilitates convenient and accurate payments, because the balance will be pre-filled in Balance Collect. However, depending on the nature of your payment requests, it may not be necessary to include the balance due.

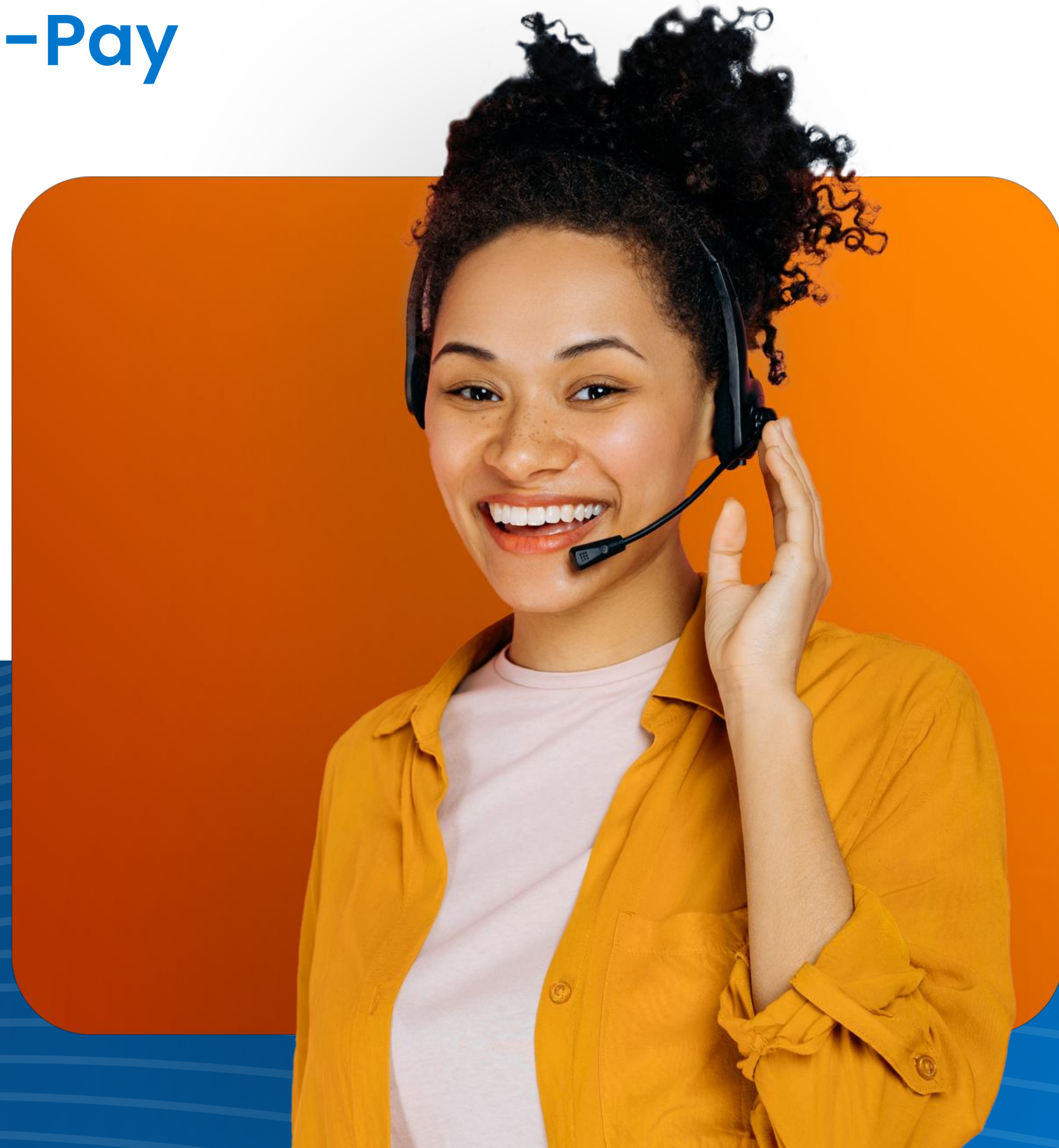




# How to Add Bulk Text-to-Pay to Bridge™ Payments

**It's time to start settling open accounts!**

If you do not have Bulk Text-to-Pay and would like to add it to your current package, please reach out to your account manager or contact our Customer Care team by calling **800-337-3630** or emailing [care@rectanglehealth.com](mailto:care@rectanglehealth.com).



# Practice Management **Bridge**<sup>®</sup>

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