

GETTING STARTED GUIDE

How to Pay Your Bills

with  simplepractice

Using the Client Portal, you can view your recent invoices, statements, superbills, and payments. You can also add a credit card and pay for your sessions.

SECTIONS:

1. Viewing your billing history and documents
2. Making payments

VIEWING YOUR BILLING HISTORY AND DOCUMENTS

1. After logging into the Client Portal, click **Billing & Payments** to see your billing page. This page provides you with an overview of your recent payment history and access to your billing documents.
2. You'll see three sections for **Invoices**, **Statements**, and **Insurance Reimbursement Statements** (superbills).

Billing & Payments

Total Balance \$300

[PAY BILL](#)

Invoices (7)

DATE	INVOICE	CHARGES	PAYMENTS	BALANCE
Aug 11, 2021	Invoice #123 Past due	\$100	--	\$100
Aug 10, 2021	Invoice #122	\$100	--	\$100
Aug 03, 2021	Invoice #121	\$100	--	\$100
Jul 29, 2021	Invoice #120	\$200	--	\$200
Jul 28, 2021	Invoice #119	\$400	--	\$400
Jul 22, 2021	Invoice #118	\$200	--	\$200

[View all](#)

Total Balance \$1000

3. At the very bottom there's a section for **Account History** that shows your most recent sessions and payments.

Account history

Date Range: All time

DATE	INVOICE	CHARGES	PAYMENTS	BALANCE
Aug 11, 2021	Invoice #123 <div>Past due</div>	\$100	--	\$100
Aug 10, 2021	Invoice #122	\$100	--	\$100
Aug 03, 2021	Invoice #121	\$100	--	\$100
Aug 03, 2021	Card payment	--	(\$100)	\$100
Jul 29, 2021	Invoice #120 <div>Paid</div>	\$200	--	\$200
Jul 28, 2021	Invoice #119	\$400	--	\$400
Jul 22, 2021	Invoice #118	\$200	--	\$200

4. Adjust the **date range** to display whichever sessions you'd like by clicking the calendar icon.

Account History⬆

Date Range: All Time📅

⬅

All Time	«	September							October							»
Last 30 days	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	BALANCE	
This Month	29	30	31	1	2	3	4	26	27	28	29	30	1	2	\$300	
Last Month	5	6	7	8	9	10	11	3	4	5	6	7	8	9	\$0	
This Year	12	13	14	15	16	17	18	10	11	12	13	14	15	16	\$150	
Last Year	19	20	21	22	23	24	25	17	18	19	20	21	22	23	\$0	
	26	27	28	29	30	1	2	24	25	26	27	28	29	30	\$0	
								31	1	2	3	4	5	6	\$150	

Mar 11, 2021

Invoice #1094


Paid

\$150

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\$150

TIP: Once you open a document, you can click **Print** to print it or **Download PDF** to download it to your computer.

 **Statement for Insurance Reimbursement #0730**
Emily Okada

DownloadPrint

From

Laughter Therapy
11801 Mississippi Ave
90025, CA 90025

Statement for Insurance Reimbursement

To


Emily Okada
540 1st St
San Francisco, CA 94104

MAKING PAYMENTS

It's easy to pay your bills in the Client Portal and stay on top of your payment history. Your **current balance** displays at the top of the page. You can either pay this entire balance, or pay a specific invoice.


1. To pay your entire balance, click **Pay Now** next to the balance amount.

Olive Branch Clinic

 | SIGN OUT

APPOINTMENTSDOCUMENTSBILLING & PAYMENTSREQUEST APPOINTMENT

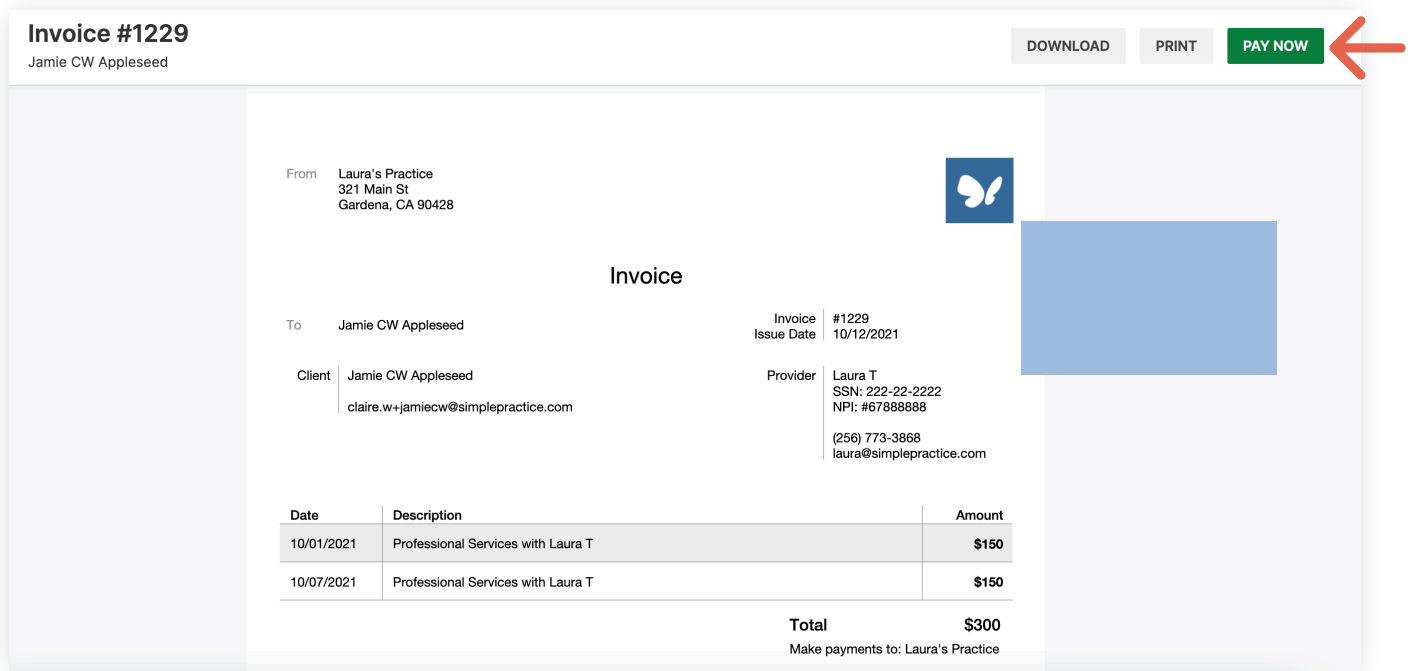
Billing & Payments

Total Balance \$300PAY BILL

Invoices (7)

DATE	INVOICE	CHARGES	PAYMENTS	BALANCE
Aug 11, 2021	Invoice #123 Past due	\$100	--	\$100
Aug 10, 2021	Invoice #122	\$100	--	\$100

2. To pay a specific invoice, open the invoice and click **Pay Now** at the top.



Invoice #1229
Jamie CW Appleseed

From: Laura's Practice
321 Main St
Gardena, CA 90428

Invoice #1229
Issue Date: 10/12/2021

To: Jamie CW Appleseed

Client: Jamie CW Appleseed
claire.w+jamiecw@simplepractice.com

Provider: Laura T
SSN: 222-22-2222
NPI: #67888888
(256) 773-3868
laura@simplepractice.com

Date	Description	Amount
10/01/2021	Professional Services with Laura T	\$150
10/07/2021	Professional Services with Laura T	\$150

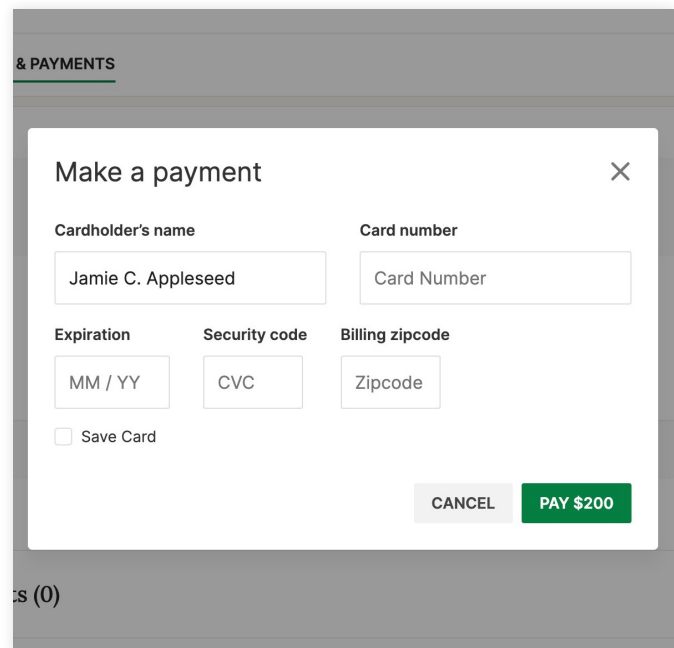
Total \$300
Make payments to: Laura's Practice

Buttons: DOWNLOAD, PRINT, **PAY NOW** (highlighted with a red arrow)

No matter which pay button you choose, the next steps are the same:

1. Enter the cardholder's name, card info, and billing zip code.
2. If you'd like to store this card to use in the future, check the **Save Card** box.
3. The amount on the **Pay** button will reflect the payment that you're making. Make sure it's the correct amount, then click **Pay \$(amount)**.
4. You'll see that the status next to that invoice date in your **Account History** section has changed to **Paid**.

If you stored the card, you'll be able to select this card for future payments.



& PAYMENTS

Make a payment X

Cardholder's name: Jamie C. Appleseed

Card number: Card Number

Expiration: MM / YY

Security code: CVC

Billing zipcode: Zipcode

☐ Save Card

CANCEL PAY \$200



Congratulations!

You're now ready to start managing billing in your Client Portal.