simplepractice

4 LEARNING

How to Pay Your Bills in the Portal

GETTING STARTED GUIDE: FOR CLIENTS

Billing & Payments

with simplepractice

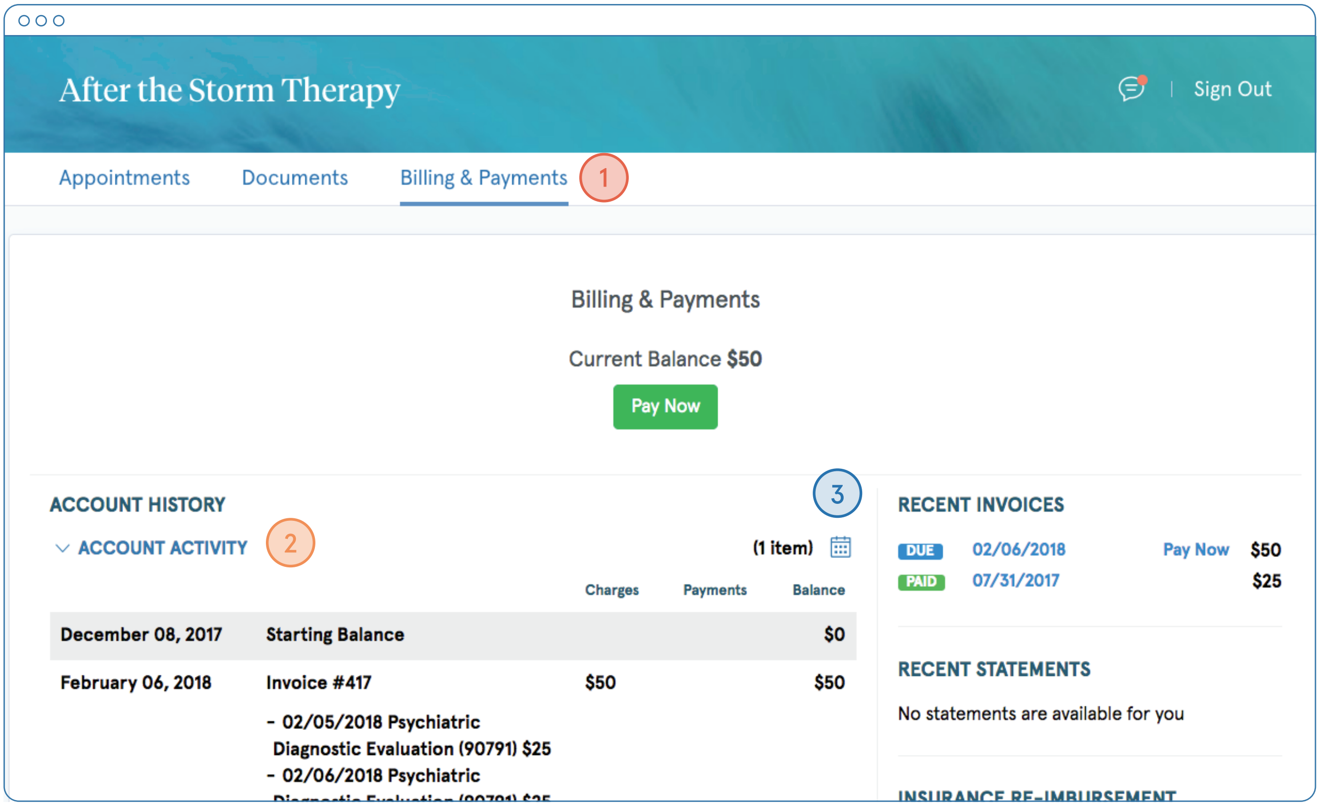
Using the Client Portal, you can view your recent invoices, statements, superbills, and payments. You can also add a credit card and pay for your sessions.

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. Click **Account Activity** to either hide or show your most recent sessions and payments.
3. You can also **adjust the date range** to display whichever sessions you'd like by clicking the **calendar icon**:

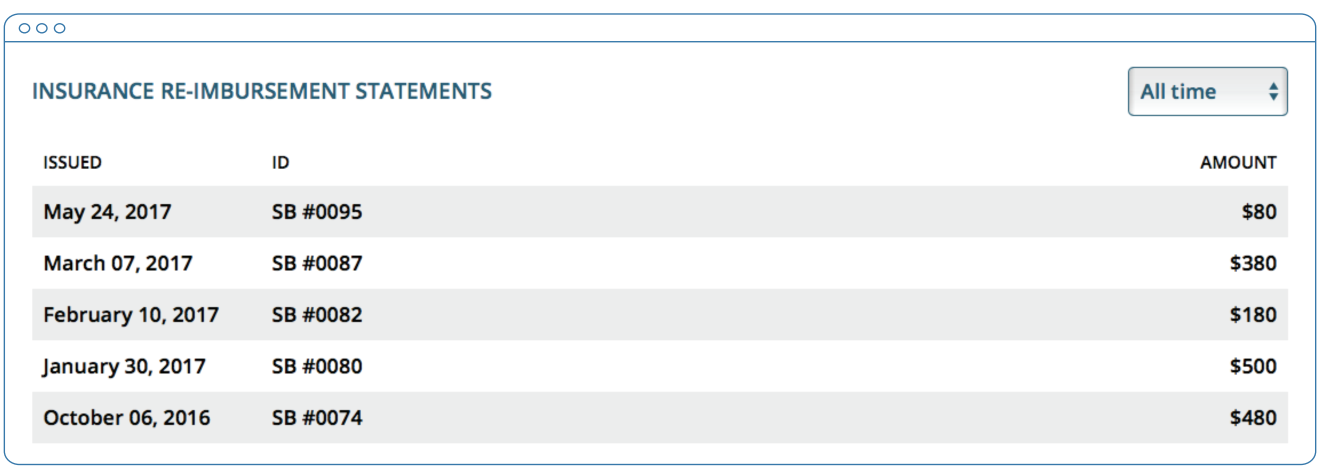


On the right side, you'll see three sections containing recent invoices, recent statements, and recent insurance reimbursement statements (superbills).

1. Click the **specific date** for a document to open (all light blue dates are clickable links).
2. Click **X in the top, right corner** to close the document (see image below).

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

3. Click **View All** to see all of your past documents in that category.



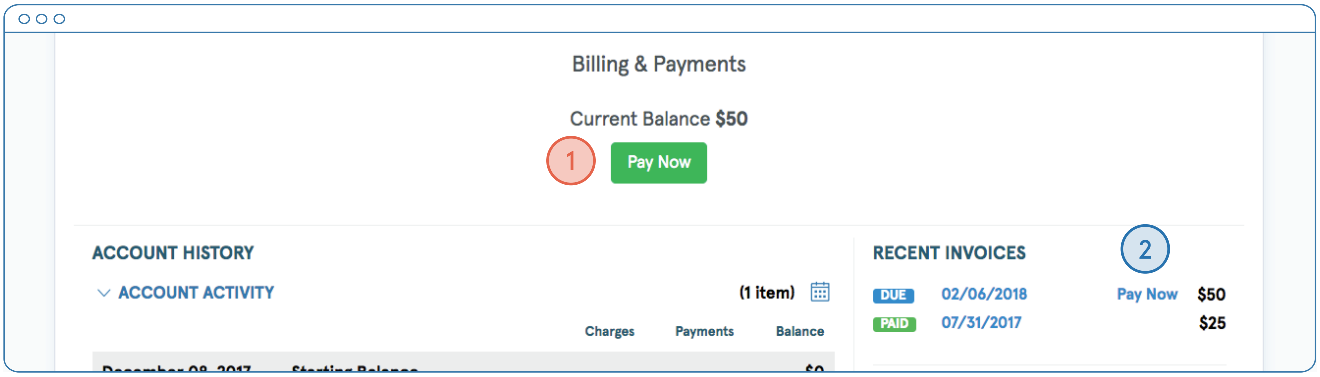
INSURANCE RE-IMBURSEMENT STATEMENTS

All time

ISSUED	ID	AMOUNT
May 24, 2017	SB #0095	$80
March 07, 2017	SB #0087	$380
February 10, 2017	SB #0082	$180
January 30, 2017	SB #0080	$500
October 06, 2016	SB #0074	$480

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.

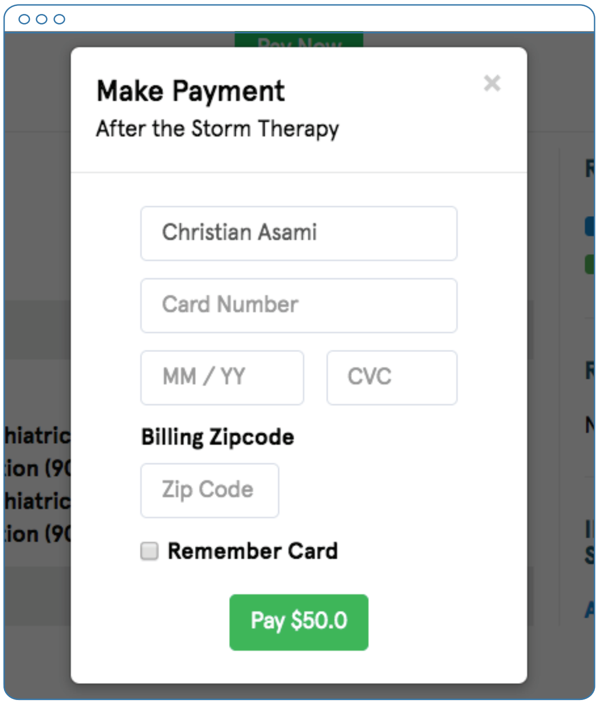
1. To pay your entire balance, click **Pay Now next to the balance amount**.
2. To pay a specific invoice, click **Pay Now next to the invoice amount** in the Recent Invoices section.

Note: You can also pay an unpaid invoice by opening up that invoice and clicking the Pay button at the top of the document.

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

1. Enter the cardholder's name, card info, and billing zipcode.
2. If you'd like to store this card to use in the future, check the **Remember 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 recent invoice section has changed from **Due** to **Paid**.

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



Congratulations!

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