simplepractice

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How to Pay Your Bills in the Portal

How to Pay Your Bills

with ✿ **simple**practice

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 **$210** **Pay Now**

Invoices (4)

Date	Details	Charges	Payments	Balance
Oct 01, 2019	Invoice #3836	$300	--	$300
View All			Total Balance	$300
			Payments ⑦	$90

Statements (1) ^

Date	Details
Sep 27, 2019	Statement #0639

Insurance Reimbursement Statements (1) ^

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	**Type**	**Charges**	**Payments**		**Balance**
Oct 01, 2019	Invoice #3836	$300	--		$210
Oct 01, 2019	Invoice #3835 PAID	CR $90	--		CR $90
Oct 01, 2019	Invoice #3834 PAID	$30	--		$0
Oct 01, 2019	Cash payment	--	($30)		CR $30
Sep 27, 2019	Invoice #3832 PAID	$150	--		$0
Sep 27, 2019	Cash payment	--	($150)		CR $150

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

Account History

09/02/2019 - 10/01/2019 📅

		September								October							Payments	Balance
All Time	«	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	»		
Last 30 days		1	2	3	4	5	6	7	29	30	1	2	3	4	5		--	$210
This Month		8	9	10	11	12	13	14	6	7	8	9	10	11	12		--	CR $90
Last Month		15	16	17	18	19	20	21	13	14	15	16	17	18	19		--	$0
This Year		22	23	24	25	26	27	28	20	21	22	23	24	25	26		($30)	CR $30
Last Year		29	30	1	2	3	4	5	27	28	29	30	31	1	2		--	$0

| Sep 27, 2019 | Cash payment | -- | ($150) | CR $150 |

| ✕ | **Statement for Insurance Reimbursement #0730**
Emily Okada | Download | Print |

From   Laughter Therapy
        11801 Mississippi Ave
        90025, CA 90025

Statement for Insurance Reimbursement

To   Emily Okada

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.

Laughter Therapy					Sign Out

Appointments   Documents   **Billing & Payments**   📅 Request Appointment

Billing & Payments

Total Balance **$210**   [Pay Now]

Invoices (4)

Date	Details	Charges	Payments	Balance
Oct 01, 2019	Invoice #3836	$300	--	$300
View All			Total Balance	$300
			Payments ⑦	$90

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

Invoice #3836
Emily Okada

Download   Print   Pay Now

From   Laughter Therapy
11801 Mississippi Ave
90025, CA 90025

Invoice

To   Emily Okada
510 Arizona Ave
Santa Monica, CA 90401

Invoice   #3836
Issue Date   10/01/2019

Client   Emily Okada

(949) 306-8945

Provider   Will Morales
Tax ID: 123-45-678
NPI: #1223334444

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.

Billing & Payments

Make a payment

Cardholder's name   Card number

Emily Okada   Card Number

Expiration   Security code   Billing zipcode

MM / YY   CVC

☑ Save Card

Cancel   Pay $360

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