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How to Pay Your Bills in the Portal

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 \$210 [Pay Now](#)

Invoices (4)

Date	Details	Charges	Payments	Balance
Oct 01, 2019	Invoice #3836	\$300	--	\$300
View All			Total Balance	\$300
			Payments 	\$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																																																																																																						
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> All Time << September October >> </div> <div style="margin-left: 10px;"> Payments Balance </div> </div>																																																																																																						
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="7">September</th> <th colspan="7">October</th> </tr> <tr> <th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th> <th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th> </tr> </thead> <tbody> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td> <td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td> </tr> <tr> <td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td> <td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td> </tr> <tr> <td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td> <td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td> </tr> <tr> <td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td> <td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td> </tr> <tr> <td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td> <td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td>1</td><td>2</td> </tr> </tbody> </table>					September							October							Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	1	2	3	4	5	6	7	29	30	1	2	3	4	5	8	9	10	11	12	13	14	6	7	8	9	10	11	12	15	16	17	18	19	20	21	13	14	15	16	17	18	19	22	23	24	25	26	27	28	20	21	22	23	24	25	26	29	30	1	2	3	4	5	27	28	29	30	31	1	2
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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** Download Print
Emily Okada

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
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View All			Total Balance	\$300
			Payments ⓘ	\$90

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

The screenshot shows an invoice interface. At the top, there is a header with a close button (X), the invoice title "Invoice #3836", and the name "Emily Okada". To the right of the header are three buttons: "Download", "Print", and "Pay Now". A red arrow points to the "Pay Now" button. Below the header, the invoice details are displayed. On the left, it says "From Laughter Therapy, 11801 Mississippi Ave, 90025, CA 90025". On the right, there is a blue rectangular placeholder. In the center, the word "Invoice" is written. Below that, it says "To Emily Okada, 510 Arizona Ave, Santa Monica, CA 90401". To the right of this, it says "Invoice #3836" and "Issue Date 10/01/2019". At the bottom, it says "Client Emily Okada" and "Provider Will Morales, Tax ID: 123-45-678, NPI: #123234444".

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 **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.

The screenshot shows a "Billing & Payments" modal window. Inside, there is a "Make a payment" form. The form has a close button (X) in the top right corner. It contains several input fields: "Cardholder's name" (with "Emily Okada" entered), "Card number" (with "Card Number" entered), "Expiration" (with "MM / YY" entered), "Security code" (with "CVC" entered), and "Billing zipcode" (empty). There is a "Save Card" checkbox which is checked. At the bottom of the form, there are two buttons: "Cancel" and "Pay \$360".



Congratulations!

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