How to Bill Pay in Simple Practice

Viewing Your Billing History and Documents

1. Log in to the Client Portal (for assistance with this, please reference our Client Portal procedures document).
2. Once logged in, click on **Billing & Payments**. This will allow you to see the billing page which provides you an overview of recent payment history and access to billing documents.
3. There are three sections- **Invoices, Statements,** and **Insurance Reimbursement Statements** (superbills).
4. At the very bottom of the page is the **Account History** which shows you your most recent sessions and payments—you may adjust the date range to see more or less sessions.
    a Once you open a document, this can either be printed or downloaded as a PDF to your computer.

Making Payments

1. In the Client Portal you will see your **current balance** listed at the top of the page.
2. To pay the entire balance, click **Pay Now** next to the balance amount. Please keep in mind that payments will automatically be applied to the ***oldest*** balance on the account.
    a. Enter cardholder name, card info, and billing zip code.
    b. You may click **save card** if you would like to store the card for use in the future.
    c. The amount on the pay button will reflect the payment you are making. Please ensure it is the correct amount before clicking the **Pay $(amount)** button.
    d. The status of the invoice will change to **Paid**. If you choose to store the card, this card can then be selected for future payments.