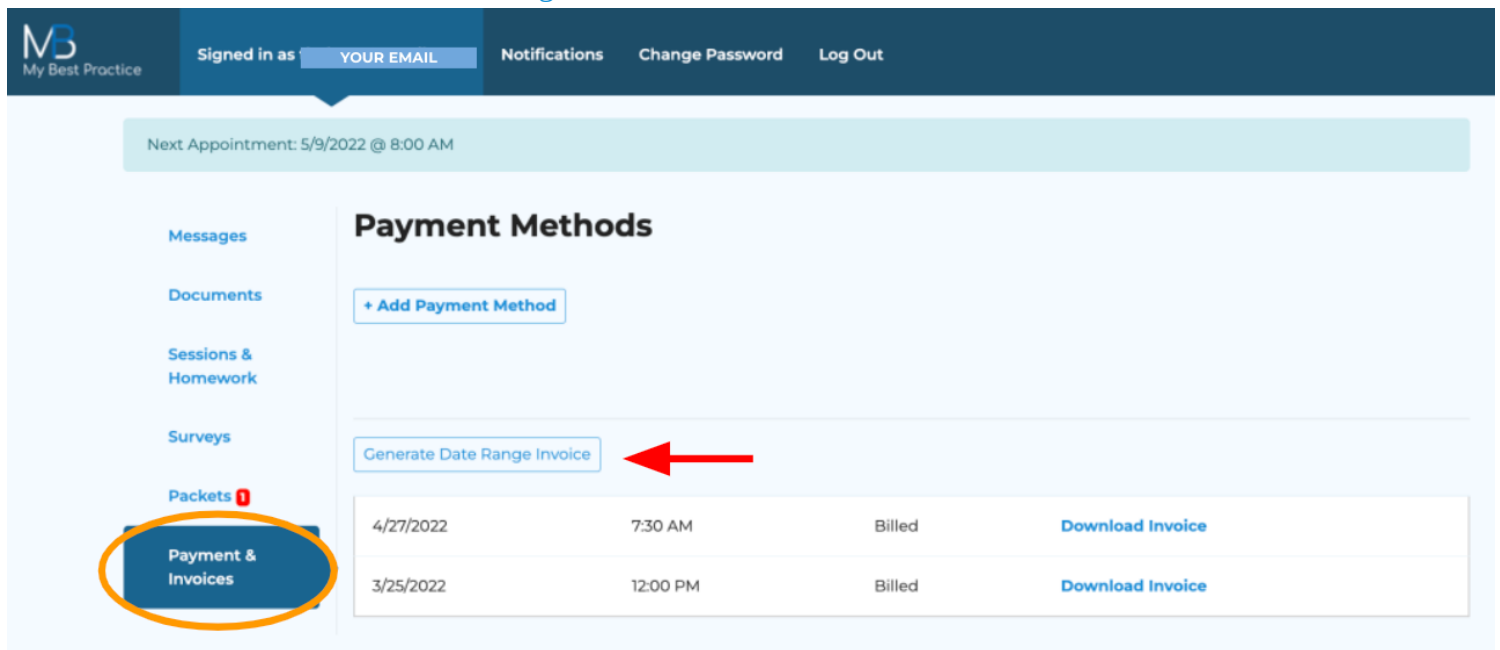


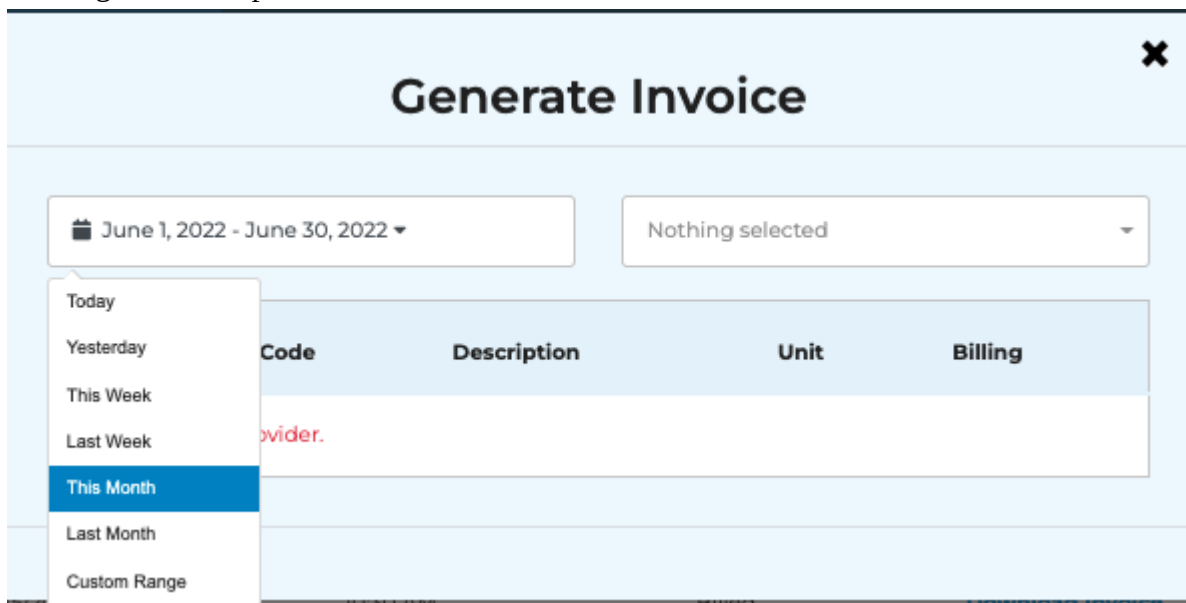
Generating Invoices/Superbills in the Client Portal

STEP 1: Navigate to the **Payment & Invoices** tab within your client portal.

STEP 2: Click on the **Generate Date Range Invoice** button.



STEP 3: Select the appropriate timeframe for the receipt/invoice/superbill that you would like to generate by clicking on the dropdown on the left-hand side.



**If you want it to span multiple months, click on the "Custom Range" option and then select the appropriate timeframe.

STEP 4: On the right-hand side, select the appropriate professional from the dropdown.

STEP 5: Any applicable sessions within the timeframe selected will then populate below. These will all be included on the invoice created.

Generate Invoice ✕


📅 June 1, 2022 - June 30, 2022 ▼

Example Supervisor ▼

Date	Code	Description	Unit	Billing
6/11/2022	90846	Family psychotherapy without patient present	1	\$200.00
6/6/2022	90846	Family psychotherapy without patient present	1	\$200.00
6/6/2022	90846	Family psychotherapy without patient present	1	\$200.00
6/5/2022	90846	Family psychotherapy without patient present	1	\$200.00

Generate Invoice

STEP 6: Click on the Generate Invoice button. The document will then automatically begin downloading within your browser.

 *Any invoices that you have already generated (or that have been created for you) will be available for future access within the Payment & Invoices tab.*