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.

My Best Practice	Signed in as	YOUR EMAIL Notifications	Change Password	Log Out		
Next	t Appointment: 5/9/2	022 @ 8:00 AM				
м	lessages	Payment Metho	ods			
D	ocuments	+ Add Payment Method				
Se H	essions & omework					
S	urveys	Cenerate Date Range Invoice	-			
P	ackets D	4/27/2022	7:30 AM	Billed	Download Invoice	
In	ayment a hvoices	3/25/2022	12:00 PM	Billed	Download Invoice	

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.

	× Generate Invoice							
	苗 June 1, 2022 - June 30, 2022 ▼		•	Nothing selected		•		
	Today Yesterday This Week Last Week	Code	Description	Unit	Billing			
		vider.						
	This Month Last Month							
574	Custom Range	117.50	I A M	BIIIHO	Lownicad II	NOICE		

**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					
苗 June 1, 20	022 - June 3	0, 2022 🕶	Example Supervisor		•
Date	Code	Description		Unit	Billing
6/11/2022	90846	Family psychotherapy w	ithout patient present	1	\$200.00
6/6/2022	90846	Family psychotherapy w	ithout patient present	1	\$200.00
6/6/2022	90846	Family psychotherapy w	ithout patient present	1	\$200.00
6/5/2022	90846	Family psychotherapy w	ithout patient present	1	\$200.00
				Gener	ate 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.