

Billing

Bill patients, take payments and keep track of what's owed. Make invoices, record and refund payments, print receipts, and set up your discounts.

Page manual · For Owners, Managers, Billing staff · aminova.health/university/billing

1. THE PAGE AT A GLANCE

Billing is where you bill patients and follow the money. Four buttons sit at the top. Under them are three tabs, with this month's numbers on the same line.

On the **Invoices** tab, your bills are listed on the left. The one you pick opens on the right. By default, owners, managers and billing staff can open this page.

Peak Vitality Clinic
Growth Plan

Billing & Invoicing
Manage patient invoices and payments

Discounts Export Ledger (CSV) Collect Payment + New Invoice

COLLECTED SEP **\$10,919** OUTSTANDING **\$3,404** OVERDUE **10** INVOICES **18**

Invoices Subscriptions Insurance

Search by patient or invoice ID...

All bills Cash Insurance More

AM Amanda Martin CLAIM - SUBMITTED **\$249**
Aug 22, 2026 Pending

AM Amanda Martin CLAIM - PAID **\$399**
Aug 21, 2026 Paid

AJ Andrew Jackson CLAIM - ACCEPTED **\$185**
Aug 20, 2026 Pending

AJ Andrew Jackson CLAIM - DENIED **\$449**
Aug 19, 2026 Overdue

AJ Andrew Jackson CLAIM - DRAFT **\$299**
Aug 18, 2026 Pending

AN Anthony Nguyen CLAIM - PAID **\$319**
Aug 17, 2026 Paid

DW Daniel White **\$399**
Jul 25, 2026 Overdue

SL Steven Lopez **\$249**
Jul 24, 2026 Paid

Invoice Pending Void Send Reminder Mark as Paid

Issued: Aug 22, 2026 · Due: Sep 5, 2026

AM Amanda Martin View all invoices View Subscription

DESCRIPTION	QTY	PRICE	TAX	TOTAL
Office visit — 99214	1	\$150.00	—	\$150.00
Comprehensive metabolic panel — 80053	1	\$99.00	—	\$99.00

CPT: 99214, 80053
ICD-10: E11.9, E78.5

Subtotal \$249.00
Tax (0%) \$0.00
Total \$249.00

Billing, on the Invoices tab.

2. THIS MONTH'S MONEY

- Collected** is every payment taken this month, in any way, less refunds.
- Outstanding** is what patients still owe: open invoices, past-due memberships and unpaid deposits. Drafts don't count.
- Overdue** counts bills past their due date and memberships that are past due.

4. **Invoices** is how many invoices you have, all time.

Discounts

Export Ledger (CSV)

Collect Payment

New Invoice

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Invoice Pending

Void

Send Reminder

Mark as Paid

Issued: Aug 22, 2026 · Due: Sep 5, 2026

Print

AM Amanda Martin

View all invoices

View Subscription

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Office visit — 99214	1	\$150.00	—	\$150.00
Comprehensive metabolic panel — 80053	1	\$99.00	—	\$99.00

This month's numbers sit beside the tabs.

Tip. Hold your mouse over a number to see exactly what it counts.

3. THREE TABS

1. **Invoices** is every bill, one at a time.
2. **Subscriptions** is every patient on a membership or plan.
3. **Insurance** is for billing a patient's insurance. If your plan doesn't include it, the tab is grayed out with a lock.

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Discounts Export Ledger

COLLECTED SEP \$10,9

Invoices Subscriptions Insurance

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All bills Cash Insurance More

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Invoice Pending
Issued: Aug 22, 2026 · Due: Sep 5, 2026

AM Amanda Martin

DESCRIPTION

Office visit — 99214

Comprehensive metabolic panel — 80053

The three tabs: Invoices, Subscriptions and Insurance.

4. FIND AN INVOICE

1. Type a patient's name or an invoice number in the search box.
2. Pick **All bills**, **Cash** or **Insurance**.
3. Use **More** to show one status only, like Overdue or Draft.
4. Click an invoice to open it. **View more** shows the next ten.

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Refills

Dr. Alex Rivera

Owner / Director

Search by patient or invoice ID...

All bills

Cash

Insurance

More

AM

Amanda Martin

CLAIM - SUBMITTED

\$249

Aug 22, 2026

Pending

AM

Amanda Martin

CLAIM - PAID

\$399

Aug 21, 2026

Paid

AJ

Andrew Jackson

CLAIM - ACCEPTED

\$185

Aug 20, 2026

Pending

AJ

Andrew Jackson

CLAIM - DENIED

\$449

Aug 19, 2026

Overdue

AJ

Andrew Jackson

CLAIM - DRAFT

\$299

Aug 18, 2026

Pending

AN

Anthony Nguyen

CLAIM - PAID

\$319

Aug 17, 2026

Paid

DW

Daniel White

\$399

Jul 25, 2026

Overdue

SL

Steven Lopez

\$249

Jul 24, 2026

Paid

NT

Nancy Torres

\$349

Jul 23, 2026

Paid

JW

Joseph Williams

\$449

Jul 22, 2026

Paid

View more (8 more)

Invoice

Pending

Issued: Aug 22, 2026 · Due: Sep 5, 2026

AM

Amanda Martin

DESCRIPTION

Office visit — 99214

Comprehensive metabolic panel — 80053

CPT: 99214, 80053

ICD-10: E11.9, E78.5

The invoice list, with search and filters on top.

5. THE OPEN INVOICE

The invoice you picked shows its status, when it was issued and due, each line, and the total. Under the patient's name you see how it was paid, and who took the payment.

View all invoices lists every bill for this patient. **View Subscription** shows the plans they're on, without leaving the page.

or invoice ID...

ance More ▾

CLAIM · SUBMITTED \$249 ⌚ Pending

CLAIM · PAID \$399 ✓ Paid

CLAIM · ACCEPTED \$185 ⌚ Pending

CLAIM · DENIED \$449 ⌚ Overdue

CLAIM · DRAFT \$299 ⌚ Pending

CLAIM · PAID \$319 ✓ Paid

\$399 ⌚ Overdue

\$249 ✓ Paid

\$349 ✓ Paid

\$449 ✓ Paid

re (8 more)

Invoice ⌚ Pending

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✓ Mark as Paid

Print

Issued: Aug 22, 2026 · Due: Sep 5, 2026

AM Amanda Martin

View all invoices

View Subscription

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Subtotal \$249.00

Tax (0%) \$0.00

Total \$249.00

One invoice, opened: its lines, total and how it was paid.

6. MAKE A NEW INVOICE

1. Click **New Invoice** and pick the patient.
2. Add lines from your price list: services, products, packages and memberships. Pick **Custom line (type your own)** for anything else.
3. Tick **Tax** on any line that is taxed. The **Tax Rate (%)** starts at the rate saved in Settings.
4. Add a saved discount, a **+ One-off discount**, or credit the patient has on file.
5. Set the **Due Date**. Left empty, it is 15 days from today.
6. Press **Create & send** to email the patient a bill with a pay link and put it in their app. Or press **Save draft** to finish it later.

New Invoice [X]

PATIENT

Search patients by name or email...

LINE ITEMS

Add a service, product, package or membership...

DESCRIPTION	QTY	UNIT PRICE	TAX	TOTAL
Description	1	0		\$0.00

+ Add line item

TAX RATE (%) 0 DISCOUNT (\$) 0

Discounts

+ One-off discount

No saved discounts yet. Add them under Billing → Discounts so the front desk can apply them in one click.

DUE DATE

mm/dd/yyyy

► SUPERBILL / REIMBURSEMENT (OPTIONAL)

MEMO

Optional — printed on the invoice

Subtotal \$0.00

A new invoice: the patient, the lines from your price list, and the totals.

Tip. For a patient who files with their own insurance, open **Superbill / Reimbursement (optional)** and add the service and diagnosis codes. Practice patients never get emails, texts or bills.

7. GET IT PAID

1. A draft has **Edit** and **Issue Invoice**. Issuing it emails the patient a pay link and puts the bill in their app.
2. A bill that is still owed has **Send Reminder** and **Mark as Paid**.
3. **Mark as Paid** is for money you already took: cash, a check, or another way. Pick how they paid and press **Confirm Payment**. That writes it down. It doesn't charge anyone.
4. To take a card in person, pick **Card (in person)** in the same box. The amount goes to your card terminal, and the invoice turns paid when the card is approved.
5. A message tells you whether the patient was emailed, or only told in their app.

Discounts
Export Ledger (CSV)
Collect Payment
+ New Invoice

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OUTSTANDING \$3,404
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Amanda Martin

View all invoices
View Subscription

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PT: 99214 80053

The invoice's buttons. Only the ones that fit its status show.

8. VOID OR REFUND

1. **Void** takes a bill that wasn't paid off the books. It stays on record as Void, stops counting as owed, and gets no more reminders.
2. Voided one by mistake? **Restore to Draft** brings it back.
3. A paid invoice can't be voided. Press **Refund** instead.
4. The refund box shows where the money goes back before you press anything. A card payment goes back to the card. Cash or another recorded payment is written down as a refund.
5. Refund all of it, or type a smaller amount and a reason. Then press **Issue Refund**.

Tip. If Aminova can't tell how an invoice was paid, it refunds nothing and tells you why.

9. RECEIPTS AND COPIES

1. Click **Print** on the open invoice.
2. Print a **Receipt**, the **Invoice**, a **Superbill**, or an **Account statement**, which shows every visit and the balance owed.
3. Or email any of them to the patient from the bottom half of the same menu.

4. **Superbill** → **patient portal** puts the superbill in the patient's app to keep.

5. Right after you mark a bill paid, you're asked if the patient wants a receipt: **Print, Email, Print & email**, or **Skip — no receipt needed**.

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Discounts | Export Ledger (CSV) | Collect Payment | **+ New Invoice**

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Invoices | Subscriptions | Insurance

Search by patient or invoice ID...

All bills | Cash | Insurance | More

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Void | Send Reminder | Mark as Paid | **Print**

AM Amanda Martin View all inv

DESCRIPTION	QTY	PRICE
Office visit — 99214	1	\$150.00
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CPT: 99214, 80053
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PRINT
Receipt
Invoice
Superbill
Account statement
Every visit & the balance owed

EMAIL TO PATIENT
Receipt
Invoice
Superbill
Superbill → patient portal
Account statement

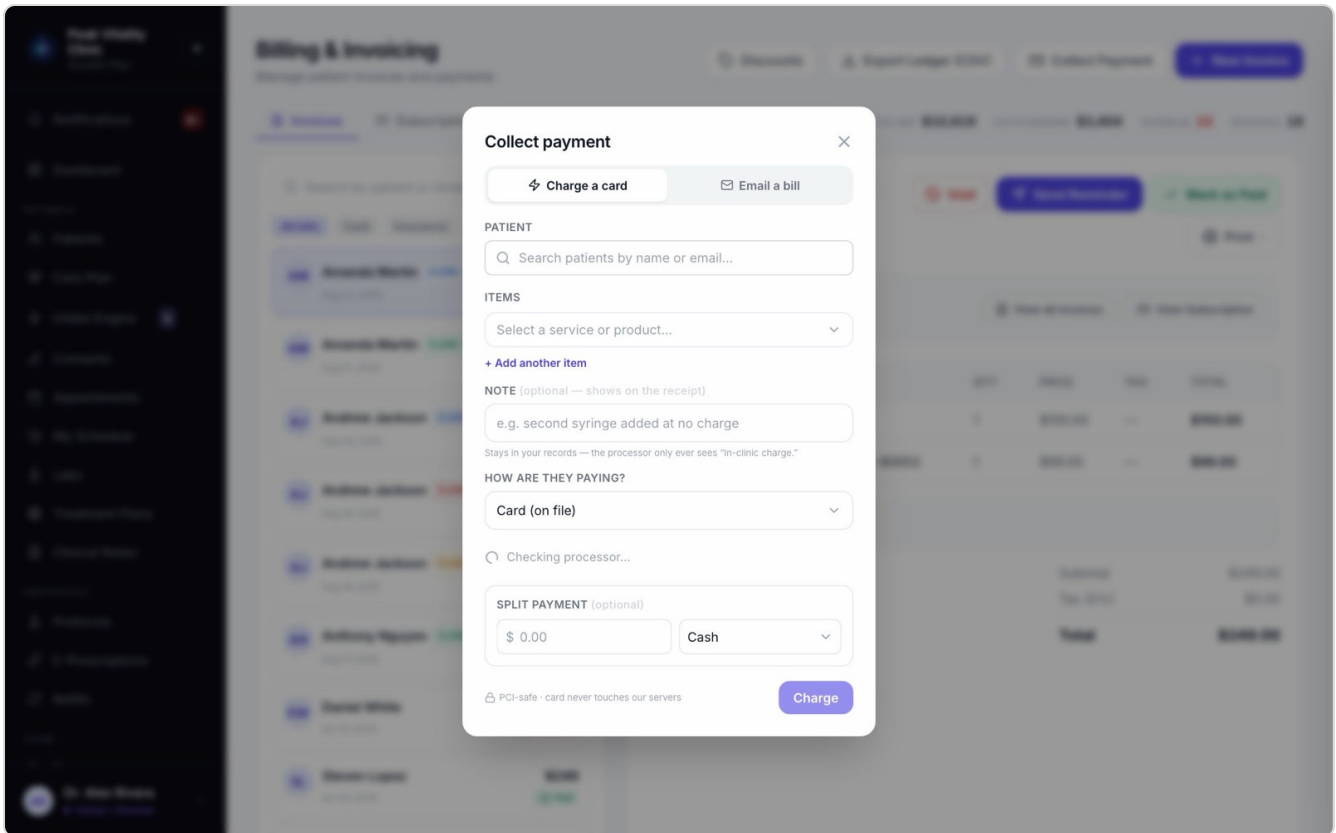
Total \$249.00

The Print menu: print or email a receipt, invoice, superbill or statement.

10. COLLECT PAYMENT

Collect Payment takes money without opening a visit first.

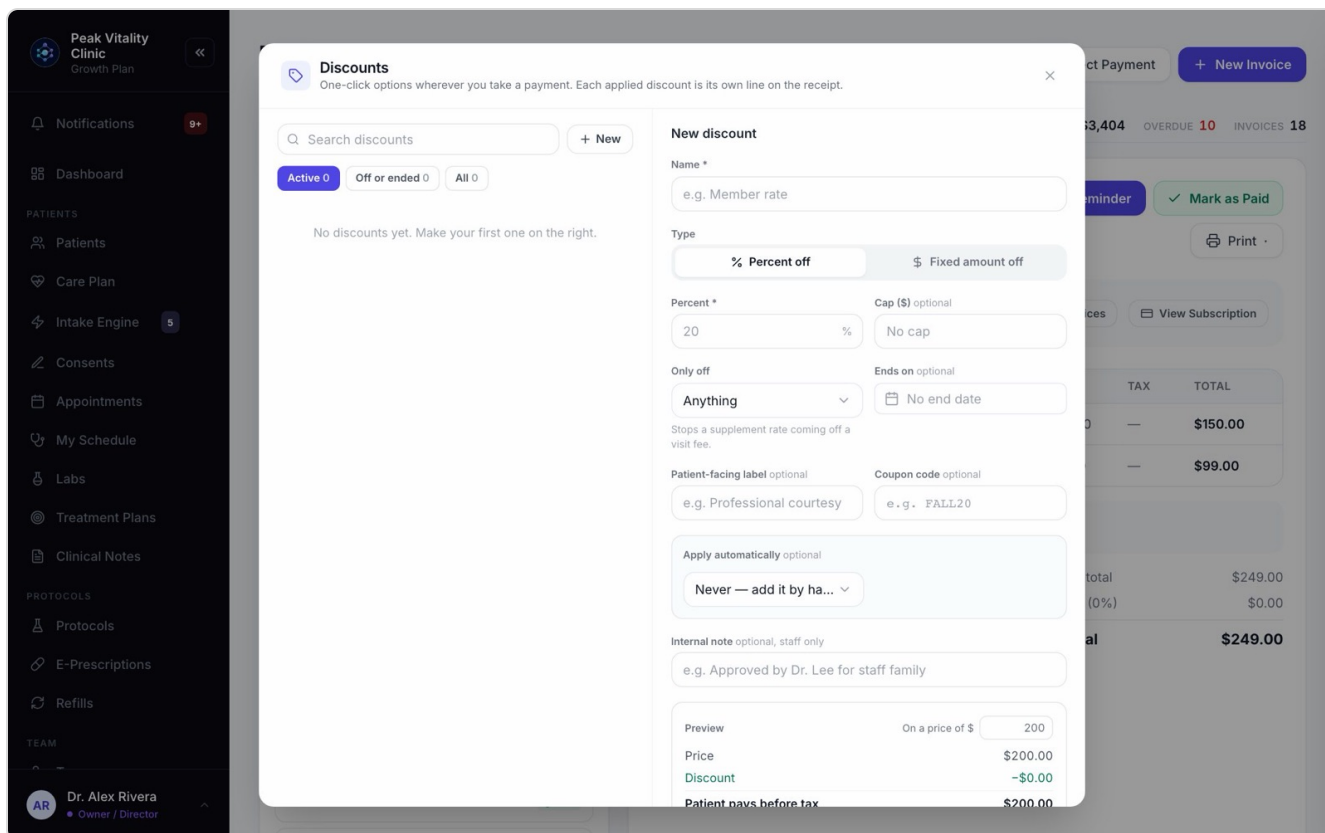
1. Click **Collect Payment** and pick the patient.
2. **Charge a card**: add what they're buying, then choose **How are they paying? Card (on file)** charges a saved card right away, and **Card (in person)** sends the amount to your terminal. Every other way only records the payment.
3. **Email a bill**: pick one of your plans and press **Send bill**. The patient pays it online, or a membership starts when they add a card.



Collect Payment: charge a card now, or email a bill.

11. SAVED DISCOUNTS

1. Click **Discounts**. The form on the right makes a new one.
2. Give it a **Name**. Choose **Percent off** or **Fixed amount off**, and the amount.
3. If you like, choose what it comes off under **Only off**, when it **Ends on**, a **Patient-facing label** for the receipt, or a **Coupon code**.
4. Under **Apply automatically**, choose who gets it on their own: everyone on a protocol, on a plan, or with a tag.
5. Press **Add discount**. It's now one click everywhere you take a payment. Use its switch to turn it off.



Discounts: your list on the left, the one you're making on the right, with a live preview.

12. EXPORT THE LEDGER

Export Ledger (CSV) downloads every invoice as a spreadsheet: subtotal, tax, total, refunds, status, dates and how each was paid.

13. THE SUBSCRIPTIONS TAB

Every patient on a membership or recurring plan, with what they pay and their next charge. Filter by **Active**, **Past Due**, **Paused**, **Trialing** or **Cancelled**.

New subscription starts one for a patient. **New membership or package** makes a new plan, which is also listed in Products.

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COLLECTED SEP \$10,919

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OVERDUE 10

INVOICES 18

New membership or package

New subscription

47 subscriptions will not be charged automatically

47 are recorded with a billing date, but no processor and no scheduler is set to collect them. Collect manually, or connect a processor that can bill on a schedule.

All Subscriptions

Search patients...

All 60

Active 40

Past Due 5

Paused 4

Trialing 7

Cancelled 4

47 active

15 results

PATIENT	PROTOCOL	BILLING	TENURE	NEXT CHARGE	STATUS
Kevin Allen	NAD+ Longevity	\$349/mo	2 mo	Sep 1, 2026	Not billing Active
James Smith	Semaglutide Weight Man...	\$1,197/qtr	2 mo	Oct 15, 2026	Not billing Active
Andrew Jackson	Tirzepatide Weight Loss	\$499/mo	2 mo	Sep 22, 2026	Not billing Active
Verity Thomas	Peptide Recovery Stack	\$349/mo	2 mo	Sep 13, 2026	Not billing Active
Sofia Marchetti	NAD+ Longevity	\$349/mo	2 mo	Sep 20, 2026	Not billing Active
Rowan Davis	Tirzepatide Weight Loss	\$499/mo	2 mo	Aug 27, 2026	Not billing Active
Susan Rodriguez	NAD+ Longevity	\$1,047/qtr	3 mo	Sep 25, 2026	Not billing Active
Andre Davis	TRT Optimization	\$299/mo	3 mo	Aug 31, 2026	Not billing Trialing

Subscriptions: every patient on a plan, and their next charge.

14. THE INSURANCE TAB

Claims lists every insurance claim and where it stands, from submitted to paid or denied. It updates on its own. To bill a patient's insurance, press **New insurance bill**, pick the patient, add the codes and the amount, and press **Create claim**.

Enrollments shows which insurers are set up to pay you electronically, with a checklist of what's left to do.

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Dr. Alex Rivera
Owner / Director

Claims
Enrollments

New insurance bill

CLAIMS
6

OPEN
3

PAID BY PAYERS
\$538.76

Search by patient, payer, or member ID...

All
Needs attention (1)
In progress
Paid

Auto-updating
Refresh now

AM
Amanda Martin
Blue Cross Blue Shield
Submitted
\$249.00

AM
Amanda Martin
UnitedHealthcare
Paid
\$399.00
\$302.18 paid

AJ
Andrew Jackson
Aetna
Accepted
\$185.00

AJ
Andrew Jackson
Cigna
Denied
\$449.00

AJ
Andrew Jackson
Anthem
Draft
\$299.00

AN
Anthony Nguyen
Humana
Paid
\$319.00
\$736.58 paid

AM
Amanda Martin
Blue Cross Blue Shield · Member MBR000004217
Claim #STEDI-DEMO-001
Submitted

BILLED
\$249.00

ALLOWED
\$0.00

PAID
\$0.00

PATIENT
\$0.00

SERVICE LINES

99214
\$150.00

80053
\$99.00

DIAGNOSES (ICD-10)

E11.9
E78.5

Billing NPI 1999999984 via Stedi Submitted 6/26/2026

Insurance: your claims on the left, the one you pick on the right.

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