

For billing staff

Your day in billing: the money taken, invoices and payments, refunds and receipts, memberships, discounts, and the numbers in Analytics.

Role manual · For Billing staff · aminova.health/university/role-billing

1. YOUR ROLE

The **Billing Specialist** role looks after the clinic's money. You make and send invoices, take and refund payments, run memberships, and read the numbers.

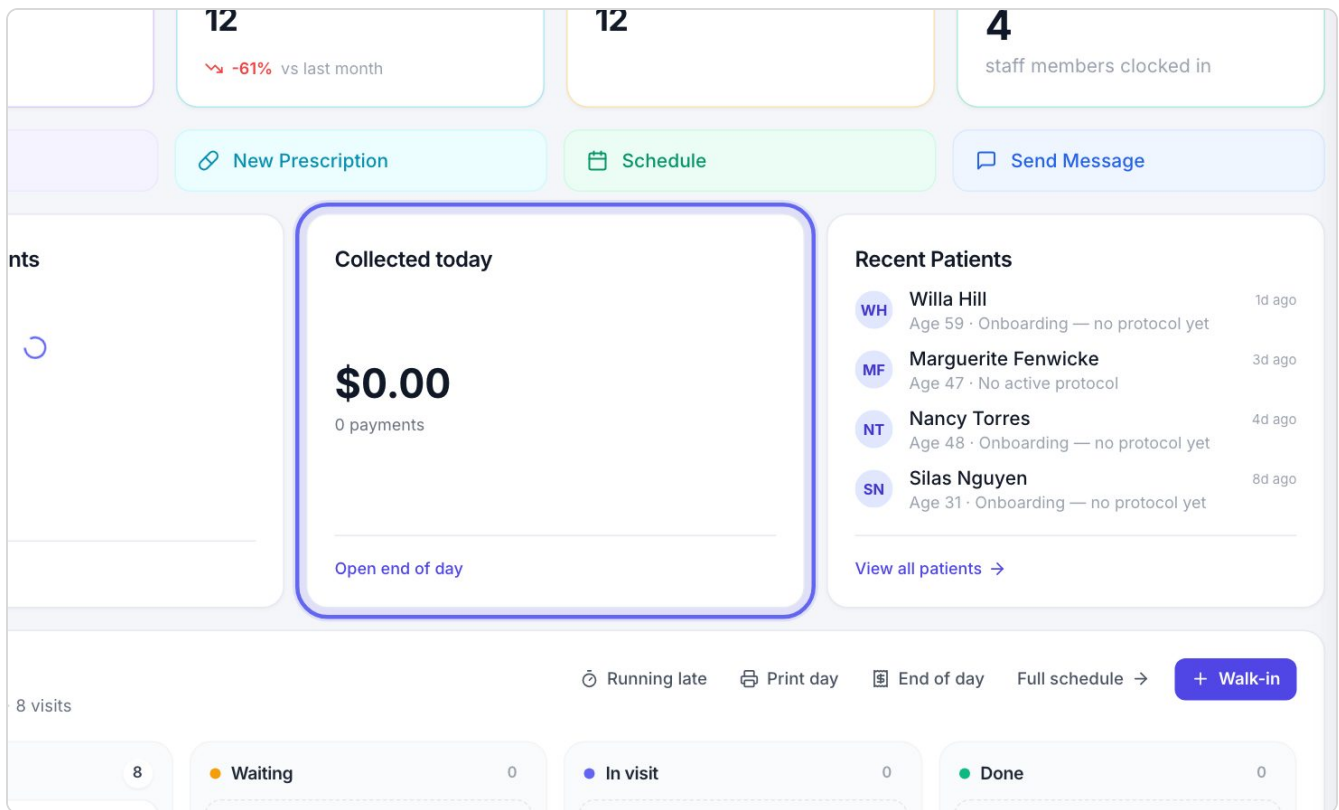
You see patients' contact details, not their medical record, and you don't work with the schedule.

2. WHAT'S IN YOUR SIDEBAR

1. **Dashboard** for today's money and failed payments.
2. **Billing** for invoices, payments, subscriptions and discounts.
3. **Analytics** for how the clinic is doing.
4. **Patients** to look someone up, and **Time Clock** for your hours.
5. The first time you sign in on a computer, a welcome offers the tutorial. It walks only these pages.

3. START THE DAY

1. **Collected today** is the money taken today, after refunds. Press **Open end of day** for the breakdown by payment method, and pick any date.
2. The **Operations Queue** shows **Failed Payments**. **Retry** asks the patient, in their app, to update their card. It doesn't charge the card again.
3. **Take Payment**, under **Quick actions**, opens Billing ready to charge.



Collected today, with the end-of-day breakdown one click away.

4. BILLING AT A GLANCE

1. Across the top: **Collected** this month, **Outstanding**, **Overdue**, and how many **Invoices**. Hover a number to see what it counts.
2. Three tabs: **Invoices**, **Subscriptions** and **Insurance**. Insurance shows a lock if your plan doesn't include it.
3. On **Invoices**, search by patient or invoice number, and click one to open it on the right.

Peak Vitality Clinic
Growth Plan

Notifications 9+

Dashboard

PATIENTS

Patients

Care Plan

Intake Engine 5

Consents

Appointments

My Schedule

Labs

Treatment Plans

Clinical Notes

PROTOCOLS

Protocols

E-Prescriptions

Refills

TEAM

Dr. Alex Rivera
Owner / Director

Billing & Invoicing

Manage patient invoices and payments

Discounts

Export Ledger (CSV)

Collect Payment

New Invoice

Invoices

Subscriptions

Insurance

COLLECTED SEP \$10,919

OUTSTANDING \$3,404

OVERDUE 10

INVOICES 18

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

Print

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.

5. MAKE AND SEND AN INVOICE

1. Click **New Invoice** and pick the patient.
2. Add lines from your price list, or pick **Custom line (type your own)**.
3. Add tax, a discount or the patient's credit if they apply. Set the **Due Date**.
4. Press **Create & send** to email a pay link and put the bill in their app. Or press **Save draft**.

New Invoice [X]

PATIENT

LINE ITEMS

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

[+ Add line item](#)

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

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

[▶ SUPERBILL / REIMBURSEMENT \(OPTIONAL\)](#)

MEMO

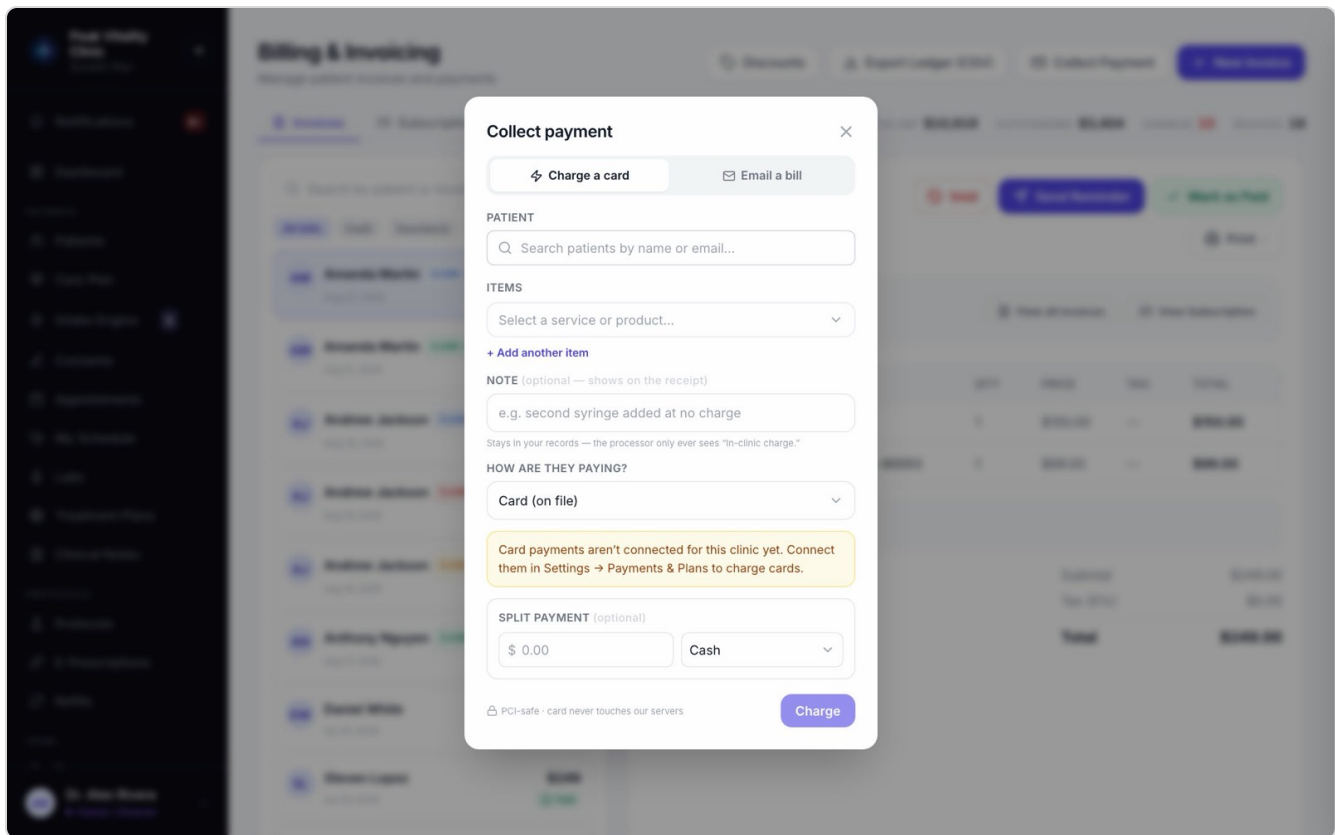
Subtotal **\$0.00**

A new invoice: the patient, the lines and the totals.

Tip. Practice patients never get emails, texts or bills.

6. TAKE A PAYMENT

1. Click **Collect Payment** and pick the patient.
2. **Charge a card:** add what they're buying, then choose how they pay. **Card (on file)** charges a saved card. **Card (in person)** sends the amount to your terminal.
3. Any other way, like cash or a check, only writes the payment down.
4. **Email a bill** sends one of your plans for the patient to pay online.



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

7. GET INVOICES PAID

1. A draft has **Edit** and **Issue Invoice**.
2. A bill still owed has **Send Reminder** and **Mark as Paid**. Mark as Paid writes down money you already took. It doesn't charge anyone.
3. **Void** takes an unpaid bill off the books. **Restore to Draft** brings it back.
4. A paid invoice has **Refund**. It shows where the money goes back before you press **Issue Refund**.

Discounts
Export Ledger (CSV)
Collect Payment
+ New Invoice

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

voice
Pending

Void

Send Reminder

Mark as Paid

Print

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

PT: 99214 80053

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

8. RECEIPTS AND STATEMENTS

1. Click **Print** on the open invoice.
2. Print or email a **Receipt**, the **Invoice**, a **Superbill** or an **Account statement**.
3. **Superbill** → **patient portal** puts the superbill in the patient's app to keep.

9. MEMBERSHIPS AND PLANS

The **Subscriptions** tab lists every patient on a membership or plan. Start one for a patient, or make a new membership, from there.

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COLLECTED SEP \$10,919

OUTSTANDING \$3,404

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

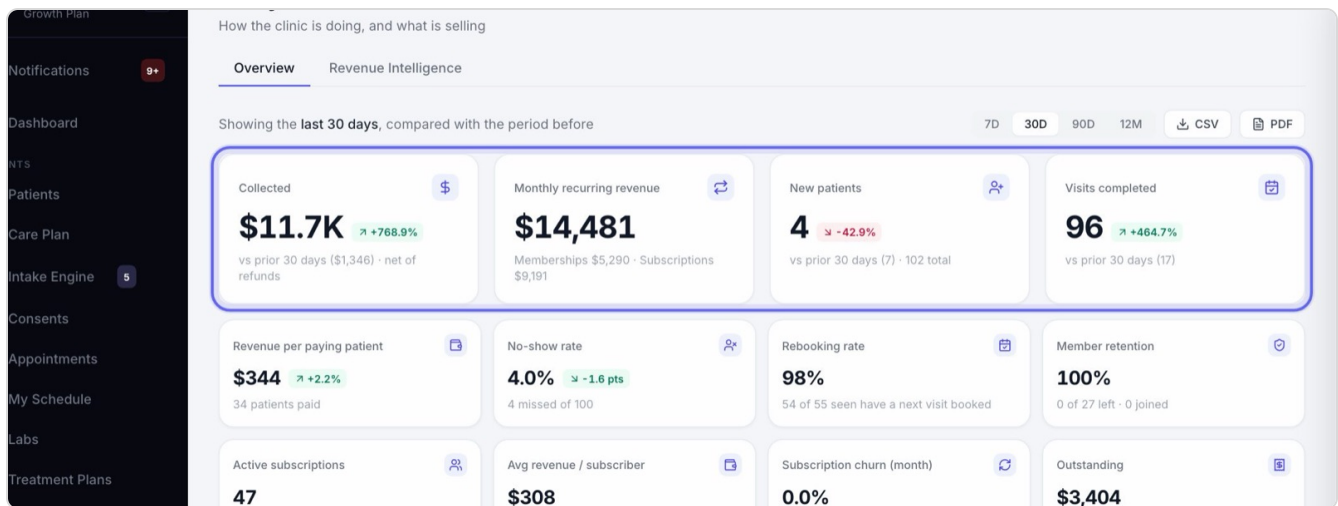
Subscriptions: every patient on a membership or plan.

10. DISCOUNTS AND THE LEDGER

1. **Discounts** holds your saved discounts, like a member rate. Make one once and it's one click on any bill.
2. **Export Ledger (CSV)** downloads every invoice as a spreadsheet: totals, status, dates and how each was paid.

11. ANALYTICS

1. The four big numbers: money collected, monthly recurring revenue, new patients and finished visits.
2. Pick a time frame from 7 days to 12 months. The arrows compare it with the time just before.
3. The **Revenue Intelligence** tab shows what's owed and for how long, renewals coming up, and plans at risk of canceling.
4. Download the numbers as a spreadsheet or a PDF report.



The four big numbers for the time frame you pick.

12. LOOK UP A PATIENT

On **Patients**, search by name, email, chart number or portal ID. The page says **Demographics view**. A patient opens as a contact card: date of birth, phone, email and emergency contact.

13. WHAT YOUR ROLE CAN'T DO BY DEFAULT

1. Open **Appointments** or **Messages**, or book visits.
2. Open a full chart, notes, labs or prescriptions.
3. Change prices of services and products, or anything in Settings. Owners and managers do that.
4. An owner or manager can change what your role can do in **Settings** → **Roles & Permissions**.