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.

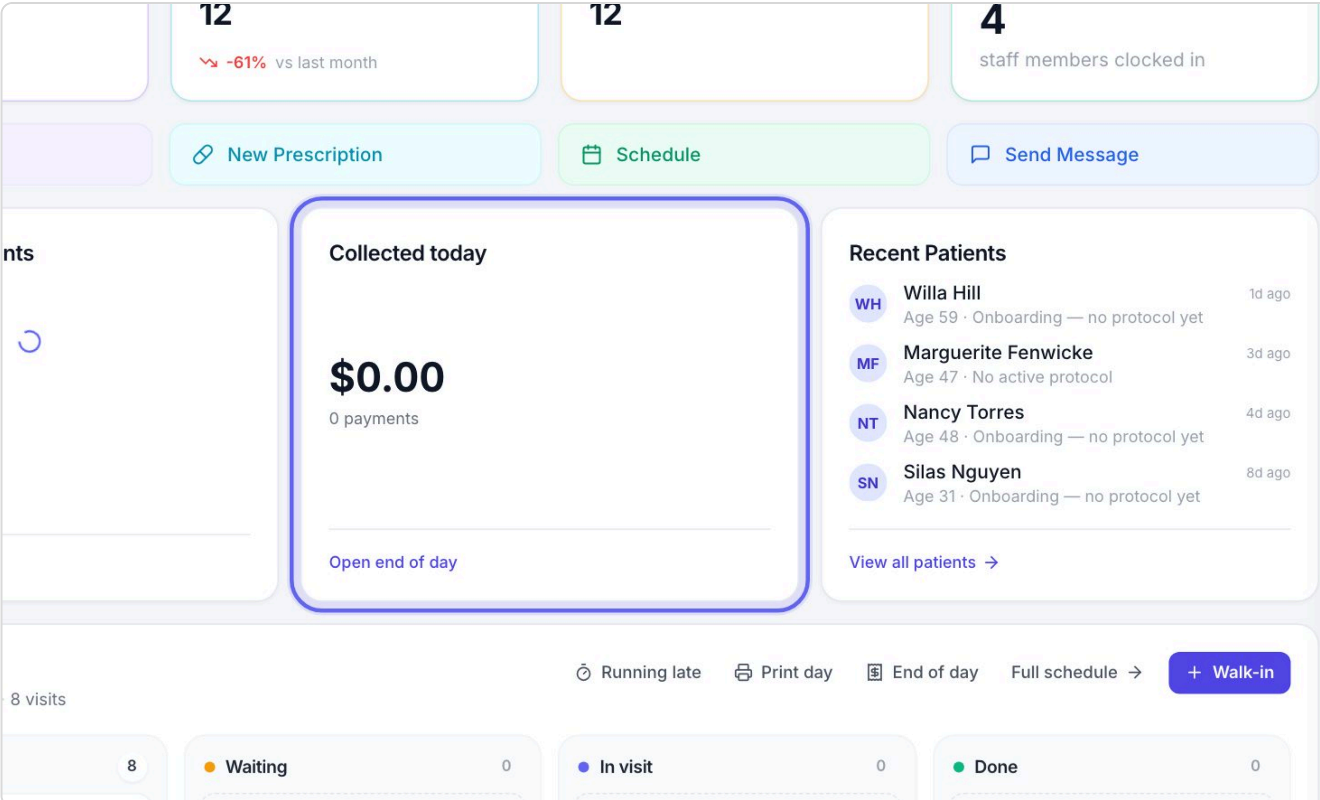
You see patients' contact details, not their medical record, and you don't work with the schedule.

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

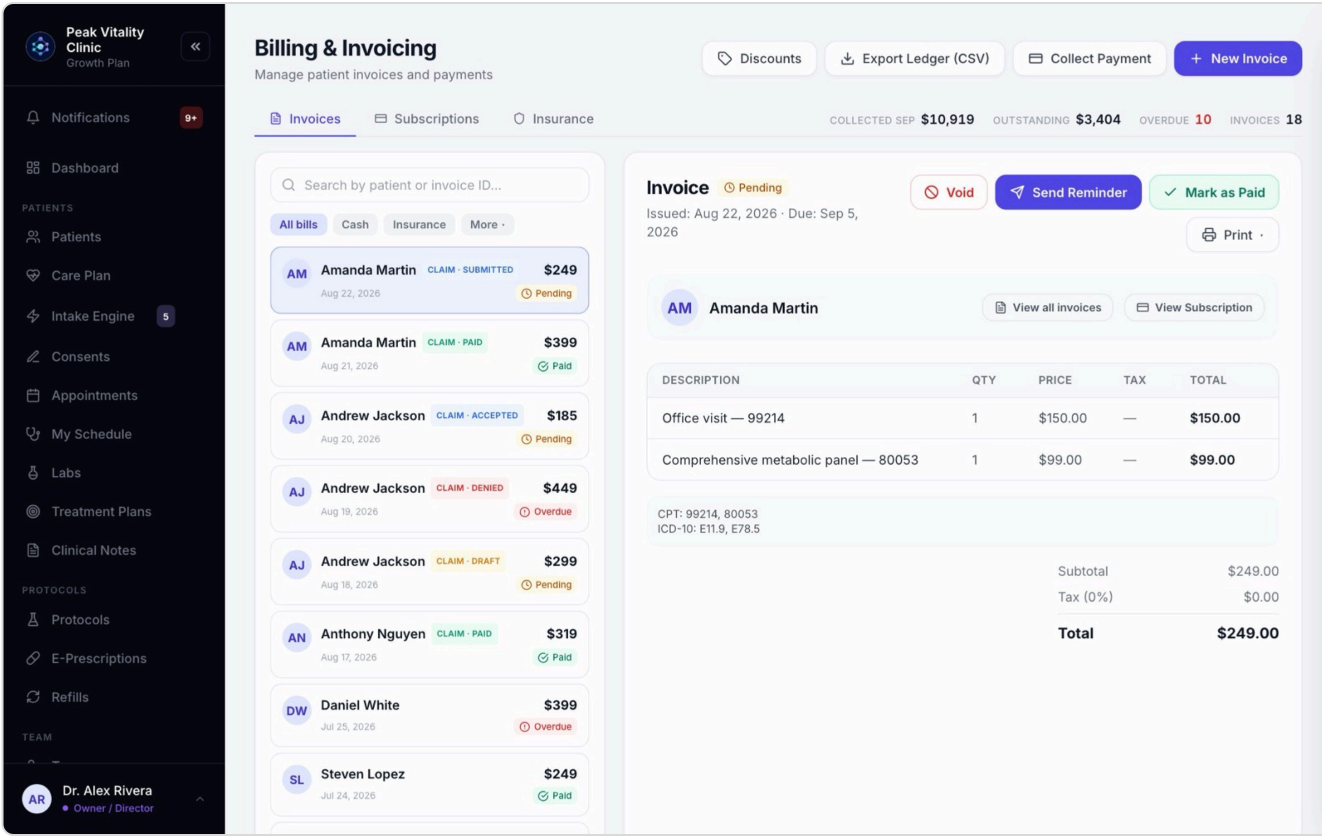
1. **Collected today** is the money taken today, after refunds. Press **Open end of day** for the breakdown by payment method, and pick any date.
2. The **Operations Queue** shows **Failed Payments**. **Retry** asks the patient, in their app, to update their card. It doesn't charge the card again.
3.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

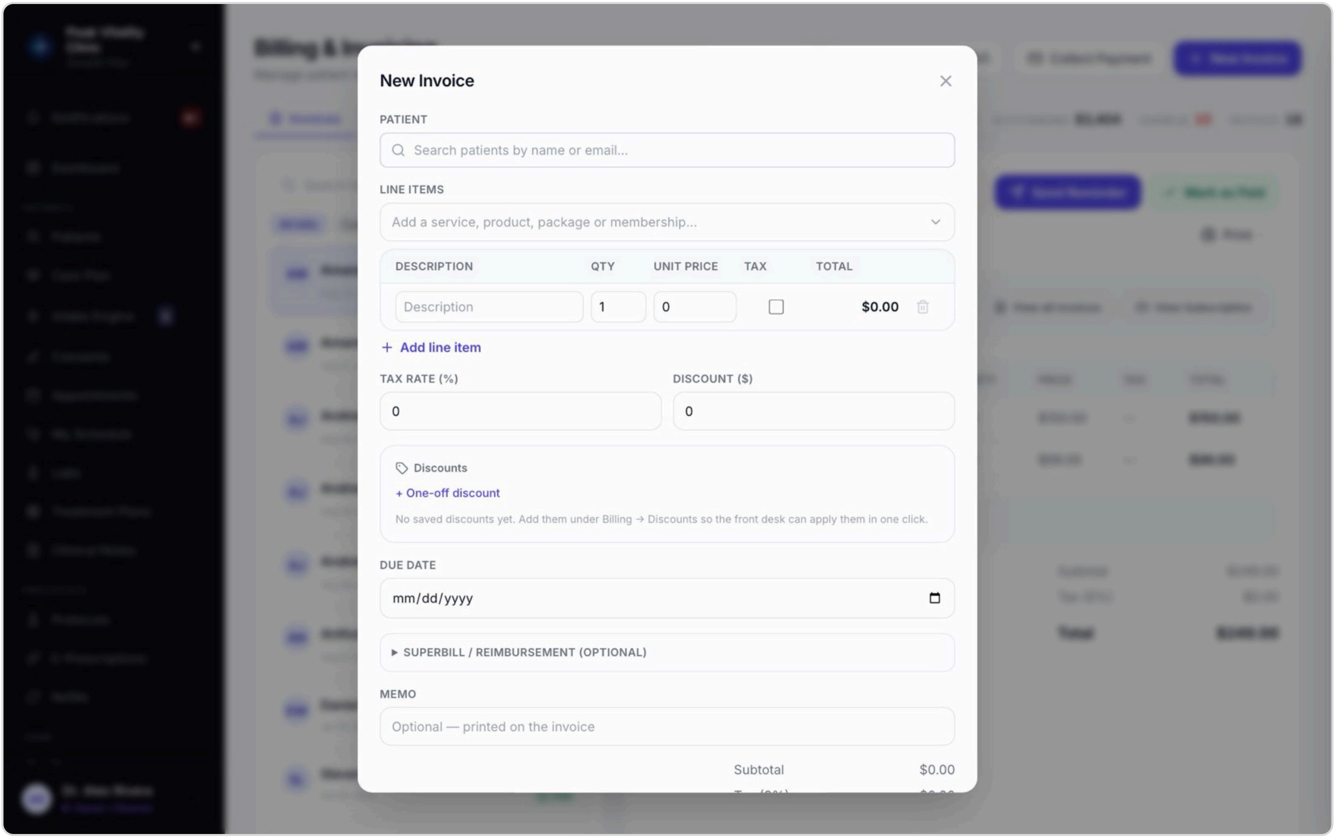
1. Across the top: **Collected** this month, **Outstanding**, **Overdue**, and how many **Invoices**. Hover a number to see what it counts.
2. Three tabs: **Invoices**, **Subscriptions** and **Insurance**. Insurance shows a lock if your plan doesn't include it.
3. On **Invoices**, search by patient or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



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**.

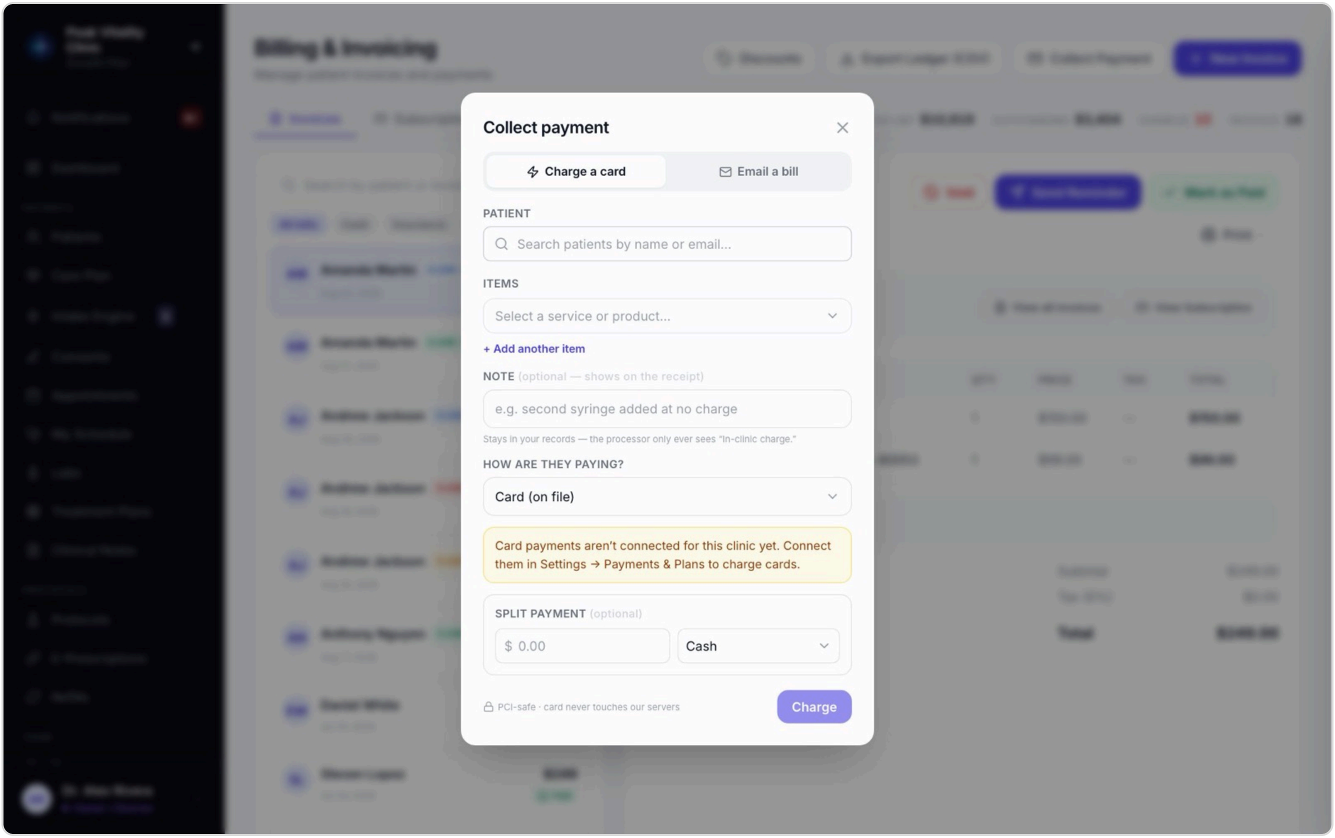


A new invoice: the patient, the lines and the totals.

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

6. TAKE A PAYMENT

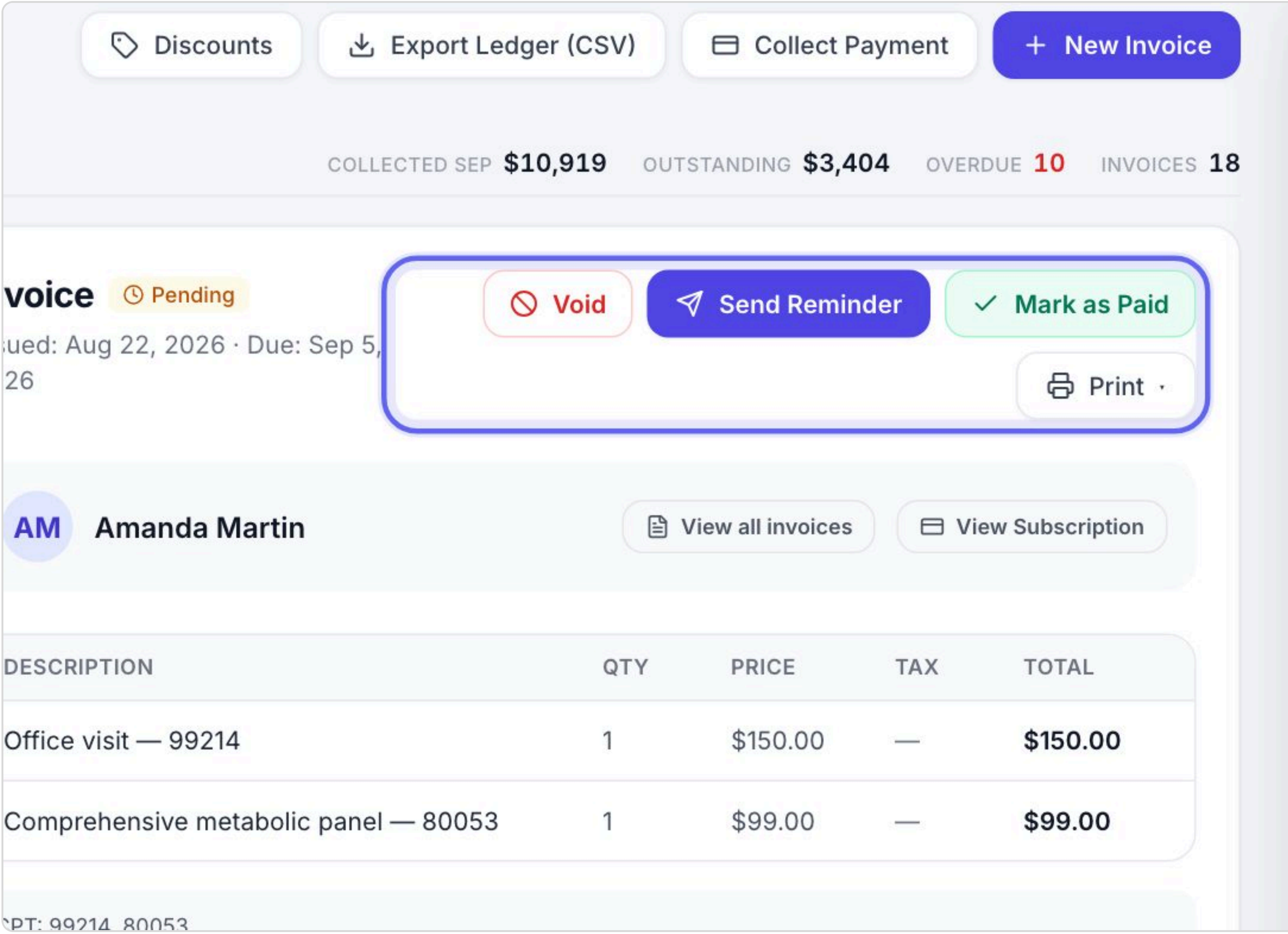
1. Click **Collect Payment** and pick the patient.
2. **Charge a card**: add what they're buying, then choose how they pay. **Card (on file)** charges a saved card. **Card (in person)** sends the amount to your terminal.
3. Any other way, like cash or a check, only writes the payment down.
4. **Email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



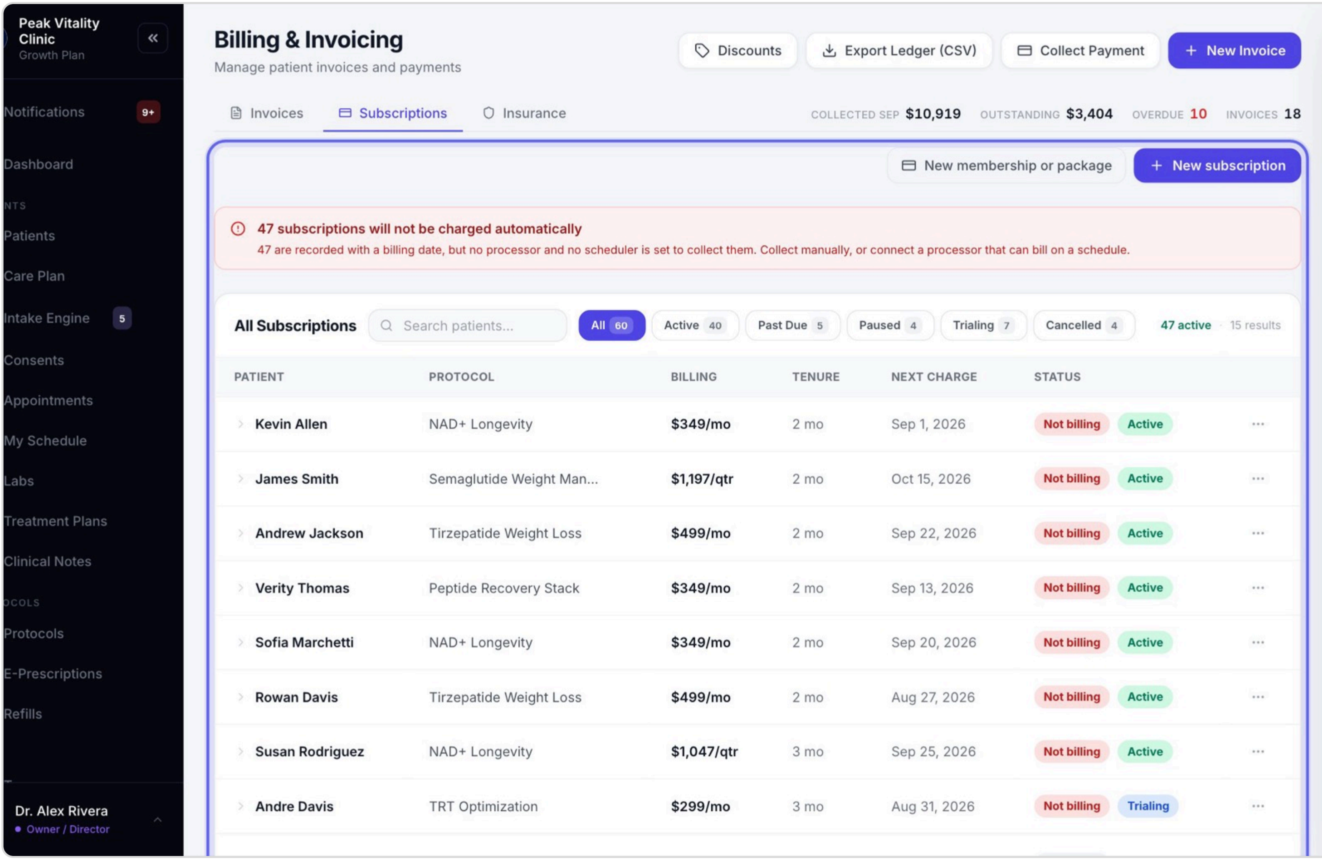
The invoice's buttons. Only the ones that fit its status show.

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.



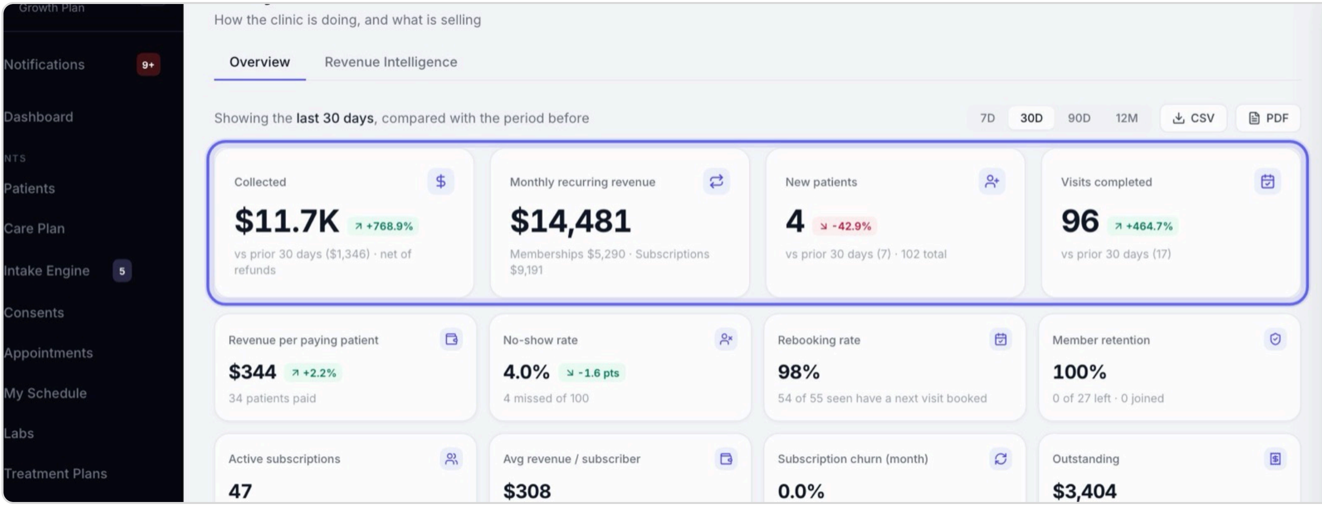
Subscriptions: every patient on a membership or plan.

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**.