

Kristin Spiegel LCSW, LLC, Electronic Invoicing and Payments

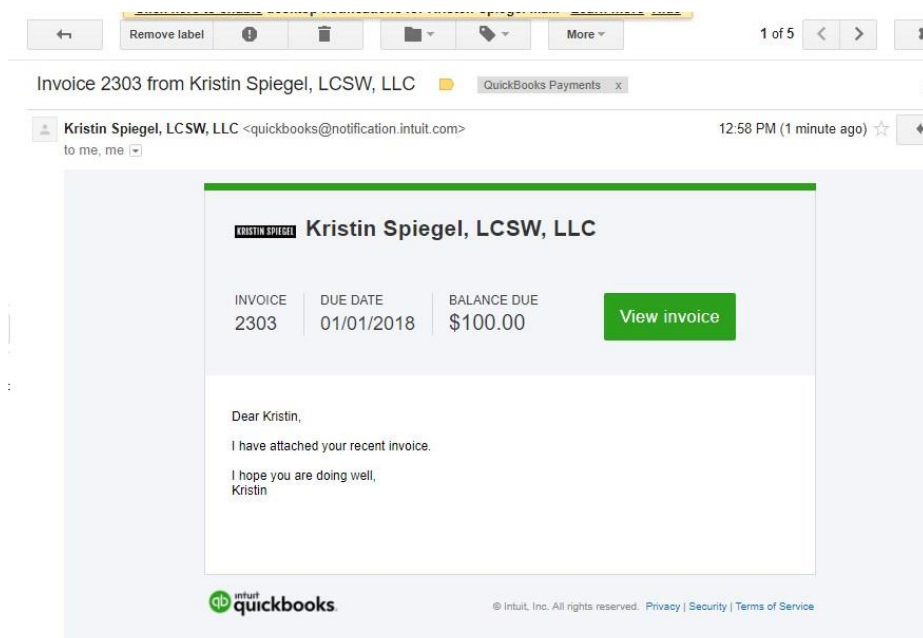
Beginning in 2018, Kristin began using an electronic invoicing and billing service to create and send electronic (email) invoices. Please send questions about the process to billing@kristinspiegel.com. If you have insurance, you can check your own insurance statement for details on copay, deductible, etc.

Invoices will normally be created and sent out approximately every other week. Clients will receive one email message for each outstanding (unpaid or partially paid) invoice. Each email message will include a link to a secure online portal where clients can view and pay the invoice through a variety of electronic payment methods including ACH bank transfer and various credit cards.

Electronic/email invoices will look like the following:

1. Email invoice to client

a. Email comes from “Kristin Spiegel, LCSW, LLC (quickbooks@notification.intuit.com)”



b. Click the green “View invoice” button to go to the electronic invoice.

2. After clicking “View invoice”, you will see the invoice details.

Invoice

Invoice

2303

Due date

January 1, 2018

Invoice total

\$100.00

Balance due

\$100.00

Pay now

VISA

MasterCard

Amex

DISCOVER

ACH

Invoice detail

Activity

Print

Save PDF

01/01/2018

Invoice # 2303

Kristin Spiegel, LCSW, LLC
270 East 8th Ave, Suite 201
Durango, CO 81301
(970) 749-6139
kristin@kristinspiegel.com

BILL TO

Kristin Spiegel
attn: Kristin
270 East 8th St.
Suite 201
Durango, CO 81301

DATE	DESCRIPTION	AMOUNT
01/01/2018	Individual Therapy	\$100.00

**Clients with insurance are only responsible for Copay, Coinsurance, and/or Deductible

INVOICE TOTAL	\$100.00
PREVIOUSLY PAID	\$
OUTSTANDING AMOUNT	\$100.00

THANK YOU.

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- a. Note, if you have insurance, you may see one or more items on your invoice with the word “Client” in them; you are responsible only for the total of those “Client” items.
- i. Example with Copay only (this is most common). Your total due: \$20.

BILL TO		
Kristin Spiegel		
attn: Kristin		
270 East 8th St.		
Suite 201		
Durango, CO 81301		

DATE	DESCRIPTION	AMOUNT
01/01/2018	Individual Therapy	\$80.00
01/01/2018	Insurance Markdown	\$-18.00
01/01/2018	Copay - Client	\$20.00

**Clients with insurance are only responsible for Copay, Coinsurance, and/or Deductible

INVOICE TOTAL	\$82.00
PREVIOUSLY PAID	\$
OUTSTANDING AMOUNT	\$82.00

THANK YOU.

- ii. Example with Copay, Coinsurance, and Deductible. Your total due: \$80.

BILL TO		
Kristin Spiegel		
attn: Kristin		
270 East 8th St.		
Suite 201		
Durango, CO 81301		

DATE	DESCRIPTION	AMOUNT
01/01/2018	Individual Therapy	\$20.00
01/01/2018	Insurance Markdown	\$-18.00
01/01/2018	Copay - Client	\$20.00
01/01/2018	Coinsurance - Client	\$15.00
01/01/2018	Deductible - Client	\$45.00

**Clients with insurance are only responsible for Copay, Coinsurance, and/or Deductible

INVOICE TOTAL	\$82.00
PREVIOUSLY PAID	\$
OUTSTANDING AMOUNT	\$82.00

- iii. The first two lines are for insurance; the first is the insurance-payable portion, and the second is the amount of “Markdown” (reduction/amount refused) by insurance. The total of insurance and client portions, before Markdown, is your original session rate (\$100 in this example).
- iv. If you have previously made a partial payment, or insurance has already paid their portion, there will be a balance in the Previously Paid field.
- b. You can use the convenient “Pay Now” button to pay on line, or, mail a check to Kristin’s office (if you pay by mail, please print and include a copy of the invoice so we know which session you are paying for).
- c. Click the “Pay now” button to proceed with electronic payment.

3. After clicking the “Pay now” button, you will see the Pay Invoice screen. If you have insurance, you will need to change the Payment amount to what you owe.
- Following the insurance example with Copay, Coinsurance, and Deductible, you will need to update for the amount you owe. **Your total of Copay, Coinsurance, and Deductible is \$80. You need to change the Payment amount from \$82 to \$80.**
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The screenshot shows the Intuit Pay Invoice screen. On the left, there's a form with the following sections:

- Sign in to pay using a saved payment method.** (Link)
- Payment amount:** A text box containing "\$ 82.00" with a red box around the "82.00" part. Below it, "Balance \$0.00" is displayed.
- Payment method:** Two radio buttons: "Debit/Credit card" (selected) and "Bank transfer".
- Debit/Credit card number:** A text box with placeholder "Debit/Credit card number".
- Expiration date:** Two text boxes for "MM" and "YY".
- Security code:** A text box with placeholder "CVC".
- Billing ZIP code:** A text box with placeholder "ZIP".
- Cardholder name:** A text box with placeholder "Cardholder name".
- ☐ Save payment method to pay faster next time (sign in or create an account to save)

At the bottom of the form, it says: "By selecting Send payment, I accept the [Terms of Service](#) and [Privacy Policy](#). I also allow Intuit to charge \$82.00 to my card on February 2, 2018."

At the bottom of the form is a large green button labeled "Send payment".

On the right side of the screen, there's a summary section:

- Amount due:** \$82.00
- TRUST** logo
- Pay with confidence**
- Enjoy peace of mind every time you pay. More than a million small businesses trust their financial data with QuickBooks.
- Information will be protected and kept confidential.

- You can pay either by Credit card or Bank transfer (“ACH”).
 - Note: You can pay by whatever method you prefer, but Credit Card payment results in a service fee to Kristin. Using Bank Transfer does not result in a service fee and that helps Kristin keep her fees lower!
 - If you use Bank Transfer, it will ask for your bank account number and bank routing number – you can see these on the bottom of your check.
 - Optionally, you can create a secure account to store your payment details. Click the “Sign in” link on top of the page and follow instructions to save your payment details. Next time you pay electronically, your information will be there.
4. Fill in all required details and click “Send payment”. You will receive a Payment Confirmation email message within a few minutes.