



CoralEHR User Guide

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Patients, appointments, and billing.

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Superbills, clinical records, and troubleshooting.

Superbills

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Before your first visit Add the patient, send their portal invitation, then schedule the appointment. After the visit, review the note, appointment status, and invoice separately.

Choosing a group session The current Group webinar is a public, non-clinical room. Read its limits before sharing a group link.

Find your way around

Use the left sidebar to move between the main areas. The Create button at the top is a shortcut for adding a patient or scheduling an appointment.

START Start here

NAME	STATUS	NEXT SESSION	LAST SEEN	DIAGNOSIS	BALANCE	ACTIONS
SM Sarah Martinez Mar 15, 1989 - 37y	ACTIVE	Today 9:00 AM In Person	Never	—	\$380.00	Chart Note Schedule Billing
DT David Thompson Jul 22, 1975 - 51y	ACTIVE	Today 10:30 AM In Person	Never	—	\$200.00 16d	Chart Note Schedule Billing
MG Maria Garcia Sep 12, 2001 - 25y	ACTIVE	Tomorrow 9:00 AM In Person	Never	—	\$0.00	Chart Note Schedule Billing
JL Jennifer Lee Nov 6, 1992 - 33y	ACTIVE	Tomorrow 10:15 AM In Person	Never	—	\$0.00	Chart Note Schedule Billing
RC Robert Chen Apr 30, 1965 - 61y	ACTIVE	Tomorrow 3:30 PM In Person	Never	—	\$0.00	Chart Note Schedule Billing
BC Benjamin Cook May 21, 1984 - 42y	ACTIVE	Sep 15 8:00 AM In Person	3 days ago	—	\$0.00	Chart Note Schedule Billing
LM Liam Morgan Jan 17, 1992 - 34y	ACTIVE	Sep 15 8:00 AM In Person	11 days ago	—	\$0.00	Chart Note Schedule Billing
LW Lucas Wright Sep 25, 1976 - 49y	ACTIVE	Sep 15 8:00 AM In Person	9 days ago	—	\$0.00	Chart Note Schedule Billing
AR Ava Rivera Feb 4, 1969 - 57y	ACTIVE	Sep 16 9:30 AM In Person	2 days ago	—	\$0.00	Chart Note Schedule Billing

The Patient List, with shortcuts on each patient row.

1 Patient List

Find a patient. Use Chart, Note, Schedule, or Billing on their row.

2 Calendar

View appointments, open their details, and change a visit.

3 Teletherapy

Find scheduled video visits or open your reusable Room.

4 Billing

Prepare invoices, follow balances, and create superbills.

5 Revenue

See revenue and set up Stripe for online card payments.

6 Inside a patient chart

The sidebar changes to that patient's Notes, Billing, Forms & Documents, and other records. Use Back to Patients to return.

Note Your practice may use “client” instead of “patient.” Some actions also depend on your role and practice settings.

RELATED TASKS

Add a patient / 5

Add a patient

Create a patient record before scheduling or billing their first visit.

START Create > Add patient

1 Open the form

Click Create at the top, then Add patient.

2 Enter their name

First Name and Last Name are required. Add their date of birth and contact information when you have them.

3 Check the email address

Use an address the patient can access for invitations and invoices. If it is already in use, check for a typo and search Patient List. If the record is not visible or belongs to someone else, contact support.

4 Add any other details

Phone, address, emergency contact, and other optional details can be completed now or later.

5 Save

Click Add Patient.

Check the result The patient appears in Patient List. Search for their name to open the record.

Add New Patient

Only first and last name are required. Everything else can be filled in later.

PERSONAL INFORMATION

First Name *

Alex

Last Name *

Morgan

Middle Name · optional

—

Preferred Name · optional

What they go by

Date of Birth

MM/DD/YYYY

Gender

Prefer not to say

CONTACT INFORMATION

Email Address · optional

alex@example.com

Phone Number

+1 (234) 567-890

Street Address

123 Main Street

City

Columbus

State

Select...

ZIP Code

43215

EMERGENCY CONTACT · optional

Name

Jane Smith

Relationship

Spouse, Parent, etc

Cancel

Add Patient

Example patient details. Only first and last name are required.

Note Adding a record does not send a portal invitation. Without an email, you can still create the chart; add a correct email before sending an invitation or invoice.

RELATED TASKS

Invite a patient to the portal / 6

Schedule an appointment / 7

Invite a patient to the portal

A portal invitation gives the patient a way to access their portal. It is separate from creating their chart.

START Patient List > patient row > More actions

1 Find the patient

Open Patient List and locate the correct person.

2 Check their details

Use More actions > Edit demographics if their email address needs updating.

3 Send the invitation

Open More actions on their row and choose Send portal invite. This action sends an invitation.

4 If they need another invitation

Use the resend or retry action shown for their invitation status. Ask them to check spam or junk and confirm the email address first.

Check the result CoralEHR reports that the invitation was sent or queued. The patient still needs to open it and follow the sign-in steps.

 Send portal invite

 Email patient

 Edit demographics

 Deactivate patient

 Delete patient

The patient row menu contains Send portal invite and Edit demographics.

Note If Complaint reported appears, resending is disabled because a previous email was marked as spam. Contact the patient by phone and ask support about the blocked invitation. A send confirmation does not prove the patient opened the email.

RELATED TASKS

Schedule an appointment / 7

Schedule an appointment

You can also use Schedule on the patient's row in Patient List.

START Create > Schedule appointment

Before you begin Have a patient record ready. Confirm the intended date, time zone, appointment type, and delivery mode.

- 1 **Choose the patient**
Search for their name and select the matching result. Check that the correct person is selected.
- 2 **Set the visit**
Choose the date, start time, duration, and Appointment Type. Check the time zone used by your practice.
- 3 **Review the charge**
Check the Fee. The appointment type may supply a default; change it if needed. Add additional charges only when appropriate.
- 4 **Choose Delivery Mode**
Select In person, Telehealth - video, or Telehealth - audio. Choose video for a video session.
- 5 **Review optional settings**
Choose reminder times. For recurring visits, turn on Repeat this appointment and check the recurrence. Forms can be attached here only for a new, non-repeating visit booked for yourself.
- 6 **Save the appointment**
Click Schedule Appointment.

Check the result You see Scheduled, and the visit appears on the Calendar.

Schedule Appointment ×
Create a new patient appointment

APPOINTMENT DETAILS

Patient *
 ▼
 Selected: Sarah Martinez

Date *

Start Time * Duration
 ▼ ▼

Appointment Type
 ▼

Additional charges optional
 Anything else you delivered in this session. Your own services and the standard add-on codes, priced the way this client is billed.
 ▼

Fee

 Using the \$175.00 appointment type fee.

Delivery Mode
 ▼

Patient reminders

Example of a 45-minute appointment with Telehealth - video selected.

Note The appointment description is preparation information. Write the clinical record in Notes.

RELATED TASKS

If scheduling needs attention / 8

Start a scheduled teletherapy session / 10

If scheduling needs attention

Check whether the appointment was created before repeating the booking.

START Schedule Appointment



Scheduling Conflict

Overlaps with Alex Morgan's appointment at 2:00 PM

A Scheduling Conflict identifies the existing visit. Choose another time before retrying.

- | | |
|---|---|
| <p>1 Scheduling Conflict
Review the existing visit and choose another time. If Appointment not created reports a time conflict, correct the time in the open form and try again.</p> | <p>3 Appointment saved, forms failed
Keep the saved appointment. Open the patient chart and assign the missing forms there; do not book the visit again.</p> |
| <p>2 Forms unavailable
Attaching forms here is unavailable when editing, repeating, or booking for another clinician. Assign them from Forms & Documents in the patient chart.</p> | <p>4 Confirm the result
Find the visit on Calendar and check its date, time, patient, and delivery mode. Check form assignments separately.</p> |

Check the result The intended appointment appears once, and any required forms are assigned.

Note For repeat visits, review the recurrence settings and any scope choice carefully. The appointment description is preparation information; write the clinical record in Notes.

RELATED TASKS

Schedule an appointment / 7

Assign forms to a patient / 32

Change or finish an appointment

Open the visit to check the patient, date, time, and current status before changing it.

START Calendar > select an appointment

- 1 Reschedule an upcoming visit**
Click Edit, change the date or time, and click Update Appointment. Check the new position on the Calendar.
- 2 Cancel a visit**
Use the cancellation action in the appointment details. Select the reason or outcome that actually happened and read any confirmation before continuing.
- 3 Record a no-show or late cancellation**
Choose the outcome that occurred. Your practice policy may create a fee draft for billing review. This does not automatically collect payment.
- 4 Complete a visit that took place**
When available, click Mark complete. Then check Billing > To invoice for the resulting draft or billing work.
- 5 Check the result**
Reopen the appointment and confirm its updated status. Review billing separately; completion does not mean the invoice has been paid.

Check the result The Calendar shows the intended time or outcome, and any resulting billing work has been reviewed.

Note For an appointment already marked cancelled or no-show, schedule a new visit when needed. If a series offers a scope choice, read it carefully before confirming.

RELATED TASKS

Start a scheduled teletherapy session / 10

Start a scheduled teletherapy session

First schedule the appointment with Delivery Mode set to Telehealth - video. Use Telehealth - audio for an audio-only visit.

START Teletherapy

Before you begin A scheduled video or audio appointment, a supported browser, and permission to use your devices.

● In session Started 2 hr 24 min ago

Jennifer Lee

2:00 – 2:49 PM · Appointment · 50 min

Open chart

Join

Join can remain available after the scheduled end, within the clinician join window.

1 Find the visit

Open Teletherapy and locate the correct patient and appointment.

2 Join at the scheduled time

Click Join when it becomes available. The clinician join window opens 15 minutes before the start and closes 2 hours after the scheduled end.

3 Allow access

The session opens in a new tab. Allow pop-ups if blocked, then allow the browser to use your microphone and camera.

4 Bring in the patient

If a guest is waiting, open Participants, verify their name, and choose Admit.

5 Use the call controls

Mute or unmute your microphone, turn video on or off, and use Share screen when needed. Audio-only visits do not use the camera.

6 Finish the visit

Use End meeting to leave the call. Return to the appointment and complete the visit and its note as appropriate.

Check the result You and the patient can communicate in the session. Afterward, check the appointment and billing status separately.

Note New session opens scheduling. It does not immediately put you in a call.

RELATED TASKS

Help a patient join their visit / 11

Use your reusable Room / 12

Help a patient join their visit

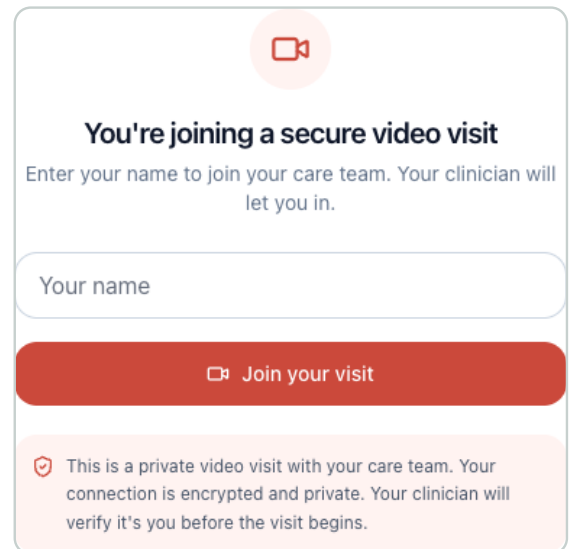
Share these steps with a patient who has received a visit link. The no-login screen shown here is shown when that link is available for their appointment.

START Patient instructions

- 1 Open the visit link**
Use the visit link supplied for this appointment, such as the link in the appointment reminder. If directed to the patient portal, follow its sign-in and visit instructions.
- 2 Enter your name**
On the screen shown here, type your name and click Join your visit.
- 3 Wait for your clinician**
Keep the tab open while your clinician starts the visit and lets you in.
- 4 Allow your devices**
Allow microphone and camera access when the browser asks. For an audio-only appointment, allow microphone access.
- 5 If you cannot join**
Check that you opened the current appointment link at the correct time. Contact your care team if the link has expired or the visit is unavailable.

Check the result Your clinician admits you and the call connects.

Note A clinician's own session tab is not the patient's invitation link.



The screenshot shows a mobile interface for joining a video visit. At the top, there is a red camera icon. Below it, the text reads "You're joining a secure video visit" followed by "Enter your name to join your care team. Your clinician will let you in." There is a text input field labeled "Your name". Below the input field is a large red button with a white camera icon and the text "Join your visit". At the bottom, there is a light pink box containing a shield icon and the text: "This is a private video visit with your care team. Your connection is encrypted and private. Your clinician will verify it's you before the visit begins."

Example of the patient's no-login appointment entry screen.

RELATED TASKS

Use your reusable Room / 12

Use your reusable Room

My Room gives you one address to reuse for one-to-one visits. Visitors wait outside until you start the Room and admit them.

START Teletherapy > Start instant visit > My Room

- 1 **Set up your address once**
Open My Room. If you do not have a Room yet, choose an available handle and click Claim Room.
- 2 **Share your Room address**
Click Copy link and share it with the intended visitor through your usual communication channel.
- 3 **Start the Room**
Click Start & join. Allow the new tab and microphone/camera access.
- 4 **Admit your visitor**
Open Participants, check the waiting person's name, and click Admit. My Room admits one visitor at a time.
- 5 **End the visit**
Use End meeting to close the active Room session. Keep the same Room address for future visits.

Check the result Your visitor joins after admission. Your Room address remains available for later visits.

Note Retire permanently gives up the address; it is not the normal way to end a visit. Starting a Room does not create a patient appointment or invoice.

Host a video room

Create a shareable link anyone can join — no account needed. Don't use patient names or other private details in the title; it's visible to everyone with the link.

My Room

One-time link

Your permanent Room

<https://patient.coralehr.com/r/sarah-example>

Share it once. Visitors wait outside until you start the Room and choose whom to admit.

 Start & join

 Copy link

 Retire

My Room provides Start & join, Copy link, and Retire.

RELATED TASKS

Host a group webinar / 13

Host a group webinar

The current group option is Group webinar: a public, non-clinical room. It is not a private group therapy workflow. Anyone with its link can join; there is no group waiting room or admission step.

START Teletherapy > Start instant visit > One-time link

- 1 **Choose the group option**
Open One-time link and select Group webinar.
- 2 **Name the webinar**
Optionally enter a public title. Do not put patient names or private health details in it.
- 3 **Create the group link**
Click Create link below the title. Use this route to create the selected group webinar.
- 4 **Share and start**
Use Copy to share the generated link with your intended audience. Check its expiry. Click Start & join to enter.
- 5 **Finish**
Use End meeting when you are finished. Revoke disables future joins through the link; it does not remove people who are already connected.

Check the result Participants can enter their name and click Join webinar.

Select Group webinar, then Create link. The guest screen explicitly describes a public webinar.

Participants enter their name to join the public webinar.

Note Do not use this public group flow for sharing diagnoses, personal health information, or private group therapy details. Contact CoralEHR about your private group therapy requirements. Group links do not create attendee appointments or invoices.

RELATED TASKS

Start a scheduled teletherapy session / 10

Use your reusable Room / 12

Connect Stripe for card payments

Connect Stripe when you want patients to pay invoices online by card. Have the appropriate practice owner or billing administrator complete setup.

START Revenue > scroll to Receive Payments

Before you begin Your practice must have online payments enabled. Complete setup for the correct practice and business.

1 Find the setup card

Open Revenue and scroll down to Receive Payments. You can also reach Revenue from your account's Payments & policies settings.

2 Choose your business type

Select Individual or Company, as appropriate for your practice.

3 Start setup

Click Set Up Payments. Complete the business, identity, and bank information requested on Stripe's hosted onboarding pages.

4 Return and check status

Return to Revenue. The account needs to be active, with Charges Enabled and Payouts Enabled, before online collection is ready.

5 Finish outstanding requirements

If shown, use Complete Onboarding. Use View Dashboard to review Stripe account requirements and payout information.

The Receive Payments setup card on Revenue.

Check the result The connected payment account is active and both charges and payouts are enabled.

Note If you see "Payments are not enabled for your practice yet," contact support@coralehr.com. Stripe determines verification requirements and payout timing. CoralEHR Plan is your software subscription, not patient payment setup.

RELATED TASKS

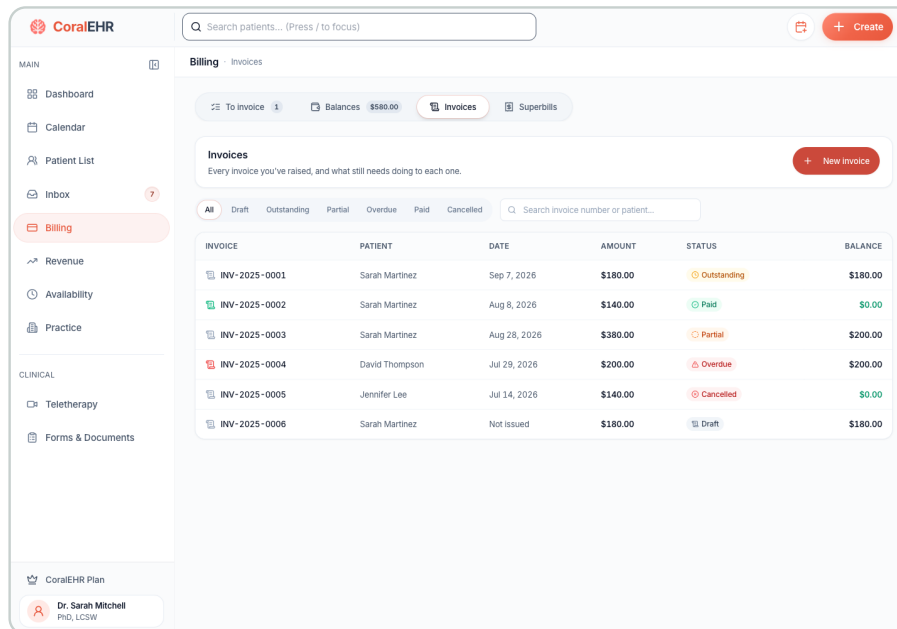
If Send invoice is unavailable / 21

Send an invoice / 20

Understand the billing workspace

Use Billing to move a visit from unbilled work to an invoice, then track the money received.

START Billing



Invoice status and balance help you see what still needs attention.

1

To invoice

Find completed sessions that need billing work and drafts waiting to go out. Review & send opens an existing draft for review.

2

Invoices

Find a particular invoice, check its balance, send it, record an external payment, or download it.

3

Balances

Review the amounts still owed by patients.

4

Superbills

Create reimbursement documents for a patient's services over a selected period.

Note Draft = not issued. Outstanding = money still due. Partial = some paid, some due. Paid = balance settled. Overdue = an unpaid amount past its due date. Cancelled = no longer an active invoice to collect.

RELATED TASKS

Know when an invoice is ready / 16

Know when an invoice is ready

Creating, issuing, sending, and collecting are separate actions. Check the saved status before taking the next step.

START Billing > Invoices > invoice status

Status	What it means / next step
Form still open	Not yet saved / Finish and create
Draft	Saved, not issued / Review and issue
Outstanding / Partial / Overdue	Issued; balance remains / Send, collect, or prepare superbill
Paid	Balance settled / Review or prepare superbill
Cancelled	Excluded from superbills / Review the billing record
Refunded / Partially refunded / Chargeback lost	Review the payment history / Ask your billing administrator

1 Check how it was created
Manual entry saves a Draft. Selecting sessions issues immediately. Completing an appointment can leave work in To invoice.

2 Review, issue, then continue
For a Draft, check charges and use Issue invoice or Issue & send. Recheck status and final due date. Then send, collect, or prepare a superbill as appropriate.

Check the result You can identify whether you have an unsaved form, a saved Draft, or an issued invoice.

 Download invoice

 Superbill — once issued

 Cancel invoice

Close details

The superbill action is disabled while the invoice is a draft.

Note Refund or chargeback statuses can show a balance without allowing normal collection. They are excluded from the period Superbills list. Do not create a replacement charge without reviewing the payment history.

RELATED TASKS

Create an invoice manually / 18

Create a superbill for a period / 26

Create an invoice from sessions

Use the session picker to bill work already recorded in CoralEHR. First check To invoice so you do not create a duplicate of an existing draft.

START Billing > Invoices > New invoice

- 1 **Choose the patient**
Click New invoice and select the correct patient.
- 2 **Review the sessions**
Eligible unbilled sessions and drafts appear in the list. Sessions are selected by default; untick anything you do not want on this invoice.
- 3 **Check the details**
Verify service dates, codes, charges, and Total Amount. Add an optional Due Date and Patient memo.
- 4 **Keep internal details private**
Use Internal Notes for billing notes that should not be shown to the patient.
- 5 **Create the invoice**
Click Create Invoice. The button may show the selected session count. This route issues immediately. If the dialog says existing drafts will be combined, check that each selected service is intended.
- 6 **Send or collect next**
Open the resulting invoice and follow the sending or payment steps. Creating it does not itself mean an email was sent or a card charged.

Check the result An issued invoice appears with the intended sessions and balance.

Note If the list is empty, check that the visit was completed and whether it already has an invoice. Manual line items and selected sessions cannot be combined in this dialog.

Create Invoice
For Sarah Martinez

Unbilled sessions

1 of 1 selected

✓ Sep 11, 2026 · Session charge 90834	\$175.00
---------------------------------------	----------

> Add a line item

Total Amount **\$175.00**

This invoice is issued right away so you can take payment on the next step.

Due Date (optional)
No due date

Patient memo (optional)
Shown to the patient on their invoice, email, and pay link...

Cancel + Create Invoice · 1 session

Review the selected service, total, due date, and patient memo before creating.

RELATED TASKS

Know when an invoice is ready / 16

Send an invoice / 20

Create an invoice manually

Use a manual line item when you need to bill a charge that is not being selected from the session list.

START Billing > Invoices > New invoice > choose patient

Before you begin Select the correct patient. A description, a positive charge, and a valid clinician selection are needed for manual creation.

- 1 **Open manual entry**
Click Add a line item. Any selected sessions are unticked.
- 2 **Check the clinician**
If Bill on behalf of appears, select the clinician whose work is being billed.
- 3 **Enter the charge**
Choose a Service Code from the fee schedule if appropriate. Check the Description, Unit Price, and Qty. Use Add Line Item for another charge.
- 4 **Check the total and notes**
Review Total Amount. Add a Due Date or Patient memo if needed. Internal Notes stay internal.
- 5 **Save the draft**
Click Create Invoice. A manually created invoice starts as a draft.
- 6 **Issue when ready**
Open the saved draft in Invoices. Review it, then use Issue invoice or Issue & send. Issue & send also emails the patient. Recheck the final due date after issuing; billing payment terms are applied at issue time.

Check the result The draft is saved. After you issue it, check the invoice status before sending or collecting.

Manual entry creates a draft; it does not collect a payment.

Note Use the session-based route for recorded visits, especially when service dates and coding are needed for a superbill. Do not create a second invoice just to send the first one.

RELATED TASKS

If Create Invoice is unavailable / 19

Know when an invoice is ready / 16

If Create Invoice is unavailable

Save the invoice form before leaving. Until it is saved and issued, you cannot use it to create a superbill.

START New invoice > manual line items

1 Check the line item

Enter a Description, Unit Price greater than \$0.00, and a valid Qty. A gray example price is a placeholder, not an entered charge.

2 Check the clinician

If Bill on behalf of appears, select the correct clinician. If nobody can be selected, ask the practice administrator to finish that clinician's chart setup.

3 Choose one way to bill

Select sessions or enter manual line items. These routes cannot be combined in this dialog.

4 Save before leaving

Click Create Invoice once enabled. If Discard unsaved changes? appears, choose Keep Editing to return. Discard Changes abandons the form.

Check the result The invoice appears in Invoices. A manual invoice is still a Draft until issued.

Create Invoice
For Sarah Martinez

+ Add Line Item

• Unit price must be greater than \$0.00 to create an invoice.

Total Amount **\$0.00**

New invoices start as drafts. Issue them from the billing workflow once details are final.

Due Date (optional)
No due date

Patient memo (optional)
Shown to the patient on their invoice, email, and pay link...

Internal Notes (optional, not shown to patient)
e.g., Insurance claim pending, follow up with patient about payment plan...

Cancel + Create Invoice

A missing price leaves Create Invoice disabled. Scroll within the form to review its total.

Discard unsaved changes?

You have unsaved changes in this invoice. If you close now, all your progress will be lost.

Keep Editing Discard Changes

Keep Editing returns to the form. Discard Changes removes the unsaved work.

Note An empty session list can mean the visit is not complete or is already billed. Review Calendar, To invoice, and existing invoices before entering a replacement charge.

RELATED TASKS

Create an invoice manually / 18

Know when an invoice is ready / 16

Send an invoice

Check the patient's email, invoice amount, due date, and patient memo before sending. In the current interface, sending with an online payment link requires Stripe to be ready.

START Billing > Invoices > open the invoice

Before you begin Use the correct patient email, an issued invoice with a balance, and an active Stripe setup for online sending.

1 For a draft

Review the draft. Use Issue & send when offered; this issues the invoice and sends it. If you only see Issue invoice, issue it first and then review the available sending options.

2 For an issued invoice

Click Send invoice in its Payment section.

3 Review the confirmation

Check the invoice number, amount, and due date in the Send Invoice dialog.

4 Send

Click Confirm Send. CoralEHR creates and includes a secure payment link automatically; you do not need to make one first.

5 Check the outcome

Look for a success or error message and the invoice's sending information. If the email fails, retry sending the same invoice after fixing the problem.

Check the result CoralEHR confirms the send request. The balance remains due until a payment is received.

Note If issuing succeeds but sending fails, the invoice may already be issued. Reopen it and use Send invoice; do not create another invoice.

Send Invoice

Email this invoice to your client with a secure link they can pay from.

INV-2025-0001
\$180.00 due by Oct 7, 2026

Ready to send

A secure payment link is created and included automatically — you don't need to make one first.

Close

Confirm Send

Confirm Send sends the email and includes a secure payment link.

Payment Where this invoice has got to, and how your client can pay it. No payment link

INVOICE STATUS	BALANCE DUE
Draft	\$175.00

No active payment link has been generated for this invoice yet.

Issue this invoice before generating a payment link or requesting an email send. Only payable invoices with a positive balance should expose collection actions.

Issue & send

A draft must be issued before a payment link or invoice email can be sent.

RELATED TASKS

If Send invoice is unavailable / 21

Collect an online Stripe payment / 22

If Send invoice is unavailable

The Payment section explains whether card collection is ready. A disconnected or incomplete Stripe account can leave Send invoice disabled.

START Invoice > Payment

An issued invoice with Stripe unavailable: Record payment remains available, while Send invoice is disabled.

1 Read the message

The example shows that card payment links require completed Stripe onboarding.

2 Finish payment setup

Open Revenue > Receive Payments. Complete onboarding and confirm that the account is active with charges and payouts enabled.

3 Check the patient and invoice

Confirm the email, issued status, and positive balance. A draft may offer only Issue invoice when online sending or the patient email is not ready.

4 Return to the same invoice

Retry its Send invoice action after fixing the issue. If the invoice was already issued, there is no need to create another.

Check the result The sending action becomes available and the send request succeeds.

Note Cash, check, and payments processed elsewhere can still be recorded without online card setup, but only after the money is received. For a practice enablement message, contact support@coralehr.com.

RELATED TASKS

Connect Stripe for card payments / 14

Send an invoice / 20

Collect an online Stripe payment

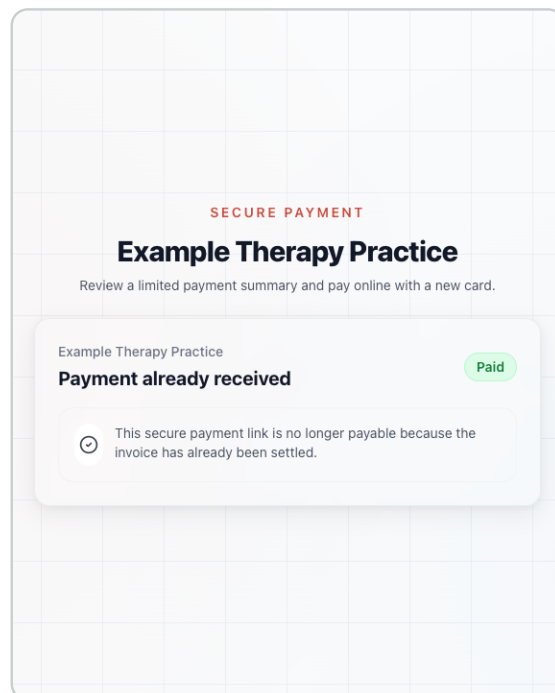
The patient completes the card payment. Sending an invoice or creating a link alone does not charge their card.

START Send invoice > patient opens the secure payment link

Before you begin Stripe must be ready; the invoice must be issued, payable, and have a positive balance.

- 1 **Send a payable invoice**
Make sure Stripe is ready and the invoice is issued with a remaining balance. Follow Send an invoice, linked in this guide.
- 2 **Or share a payment link**
In the invoice, open More invoice actions > Create payment link. When a link exists, use Copy payment link and share it with the intended patient.
- 3 **The patient checks the amount**
The secure page shows a limited payment summary. The patient enters a new card and clicks Pay followed by the amount shown.
- 4 **If the payment needs attention**
Complete any card verification. If the page says Payment submitted, use Refresh Payment Status. Follow the related recovery task for a decline, expired link, or unclear result.
- 5 **Confirm in CoralEHR**
Reopen or refresh the invoice. A settled invoice shows Paid with no remaining balance. Partial means an amount is still due.

Check the result The invoice reflects the payment and the correct remaining balance. Bank payout timing is shown separately in Stripe.



Example patient confirmation after the invoice balance has been settled.

Note If a payment link expires or is revoked, create or replace it from the same invoice and share the new link. Use Record payment only for money received outside this checkout.

RELATED TASKS

If a payment cannot be completed / 23

Record cash or a payment taken elsewhere / 24

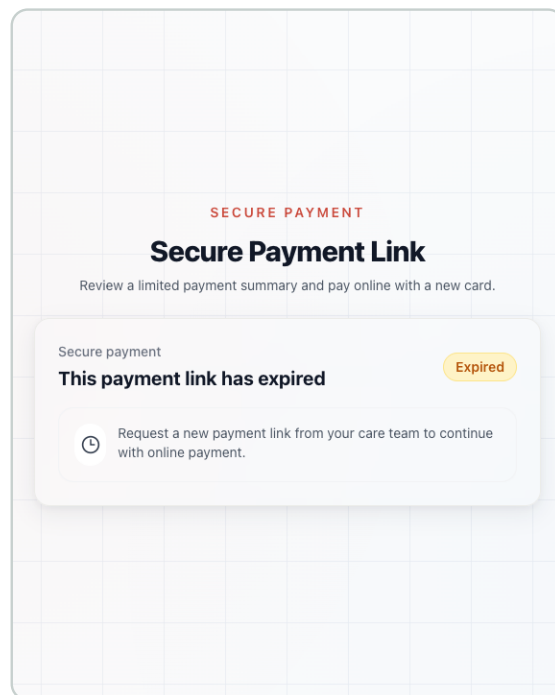
If a payment cannot be completed

Read the payment page message before retrying. An expired link, a declined card, and an uncertain payment need different next steps.

START Patient payment page

- 1 **Expired or revoked link**
Check the original invoice and remaining balance, then create or replace its payment link. Share the current link with the intended patient.
- 2 **Card explicitly declined**
Ask the patient to check their card details or use another card. Follow any correction instructions on the page.
- 3 **Payment submitted or result unclear**
Use Refresh Payment Status or Refresh Link Before Trying Again, whichever appears. Check the invoice before attempting another payment.
- 4 **Already paid**
A Paid invoice with zero balance does not need another payment. Do not record the same Stripe checkout payment manually.

Check the result The invoice confirms payment, or the patient has a clear next step based on the actual error.



The expired-link page asks the patient to request a new link.

Payment submitted

We're waiting for payment processing to finish. This page only refreshes safe payment-link status and will not show treatment details.

[Refresh Payment Status](#)

Payment submitted is still waiting for processing. Refresh Payment Status before trying another payment.

Note A timeout or unavailable page does not prove a charge failed. Check the current invoice and payment status before retrying.

RELATED TASKS

Collect an online Stripe payment / 22

Send an invoice / 20

Record cash or a payment taken elsewhere

Use this only after you have received the money outside CoralEHR's online payment flow.

START Billing > Invoices > open invoice > Record payment

Before you begin Confirm that the money was actually received outside CoralEHR checkout. Check the remaining balance.

- 1 **Check the invoice**
Confirm the patient, invoice number, and remaining balance.
- 2 **Enter the amount received**
Click Record payment. Enter the payment amount, which cannot exceed the balance due.
- 3 **Choose the method**
Select Cash, Check, External card, or Other, as appropriate. External card means a card payment already processed elsewhere.
- 4 **Add a reference**
Optionally enter a check number or receipt reference and an internal note.
- 5 **Save**
Click Record followed by the displayed amount. Check the updated balance.

Record Payment

Record cash, check, or another external payment for INV-2025-0001.

Balance due

\$180.00

Amount

Method

Cash

Reference

Notes

Cancel

Record \$180.00

Record Payment is for cash, check, or payments processed elsewhere.

Check the result The invoice shows Paid if the balance is fully settled, or Partial if money remains due.

Note This form records a payment; it does not charge a card or move money through Stripe. Do not record a Stripe checkout payment again here.

RELATED TASKS

If a recorded amount is too high / 25

Collect an online Stripe payment / 22

If a recorded amount is too high

Record Payment accepts a positive amount up to the invoice's current balance. It records money already received elsewhere.

START Invoice > Record payment

1 Compare the amount and balance

In this example, \$200.00 is greater than the \$180.00 balance, so the save action is disabled.

2 Correct the amount

Enter the amount actually received for this invoice. A payment below the balance leaves it Partial.

3 Investigate a mismatch

If your receipt and invoice disagree, check the patient, invoice, prior payments, and allocation before recording anything.

4 Record once

Choose the correct method and save. Refresh the invoice to confirm the balance.

Check the result The recorded amount matches the actual receipt and the invoice's updated balance.

Record Payment

Record cash, check, or another external payment for INV-2025-0001.

Balance due

\$180.00

Amount

200

Method

Cash

Cannot exceed the current balance.

Reference

Check number, receipt ID, or note

Notes

Optional internal note

Cancel

\$ Record \$200.00

"Cannot exceed the current balance" explains why Record \$200.00 is disabled.

Note External card is for a card payment already processed elsewhere. This form does not charge a card, issue a refund, or collect extra money.

RELATED TASKS

Record cash or a payment taken elsewhere / 24

Collect an online Stripe payment / 22

Create a superbill for a period

A superbill summarizes services for a patient to submit to their insurer. Creating one does not submit an insurance claim or guarantee reimbursement.

START Billing > Superbills

Before you begin Create and issue the source invoice first. It must contain service dates in the selected period. Draft and cancelled invoices do not qualify.

Superbills
One document per client for the whole period — the form they send to their insurer.

August September This quarter Year to date Custom range

2 clients with sessions in August Aug 1, 2026 – Aug 31, 2026

SM	Sarah Martinez	2 sessions · Aug 8, 2026 – Aug 29, 2026 · \$520.00	Create superbill
DT	David Thompson	1 session · Aug 29, 2026 – Aug 29, 2026 · \$200.00	Create superbill

Choose the service period, then Create superbill for the patient.

- 1 Choose the service period**
Select the month or another preset. For specific dates, choose Custom range and set From and To.
- 2 Find the patient**
Review the listed sessions, service dates, and charges. Click Create superbill next to the correct patient. If the list is empty, check the source invoice status and service dates before retrying.
- 3 Review the document**
Check Covers and the reimbursement details. The date range is based on services, not the invoice's creation or due date.
- 4 Fix missing information**
Complete the missing details shown in the panel. Use the related task, Check a superbill before sharing, to review the document.
- 5 Generate and download**
When the information is correct, click Generate superbill, then Download PDF. Review the downloaded file before sharing it with the patient.

Check the result The superbill is saved to the patient's chart and you have downloaded the correct PDF.

Note Full payment is not required. Review paid amounts and balances before generating. Later payments do not update a saved PDF. Generating a superbill does not email it.

RELATED TASKS

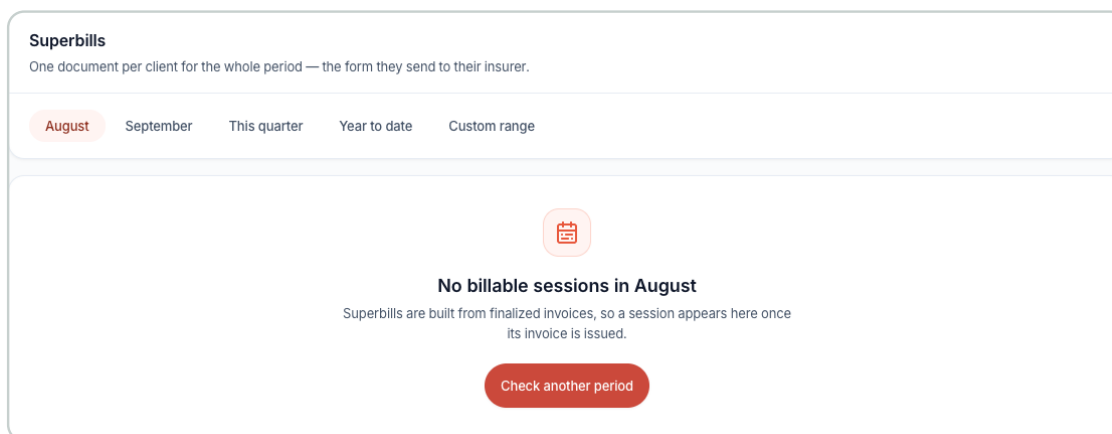
If a patient is missing from Superbills / 27

Check a superbill before sharing / 28

If a patient is missing from Superbills

The Superbills list uses issued invoices and their service dates. Complete and issue the invoice for each appointment first.

START Billing > Superbills



A session appears in this list after its invoice is issued.

1 Find the source invoice

Check To invoice and Invoices. If no invoice was saved, complete creation. If it is Draft, review and issue it first.

2 Check its status

The period list accepts issued, partial, overdue, and settled invoices. Draft, cancelled, refunded, partially refunded, and chargeback-lost invoices are excluded.

3 Check the service period

Choose a month or Custom range containing the actual service dates. Invoice creation and due dates do not determine eligibility.

4 Check the service dates

An invoice without service dates will not appear in this list. For recorded visits, use Create an invoice from sessions and check the dates.

5 Check for a loading error

No billable sessions means no eligible invoices were found for that period. If you see Couldn't load this period, click Try again.

Check the result The intended patient appears for the period, or you have identified the missing invoice, status, or service-date information.

Note Check another period changes the selected period. It does not issue a draft or add missing service dates.

RELATED TASKS

Know when an invoice is ready / 16

Create a superbill for a period / 26

Check a superbill before sharing

The review panel lists missing information. Use the patient's records to complete it.

START Superbill review panel

1 Patient and provider

Check patient name, date of birth, and address; rendering provider name and NPI; and practice Tax ID.

2 Clinical details

Verify diagnosis, service dates, procedure codes, fees, and place of service against the records.

3 Save corrections

Complete the offered fields and click Save. This updates the underlying chart or practice information.

4 Check Covers

A multi-service invoice overlapping your selected period can include service dates outside it.

5 Inspect the generated PDF

Resolve missing details first. Review patient, provider, services, and payment amounts. Download each document if several clinicians are involved.

6 Share securely

Send the reviewed PDF through your practice's appropriate secure channel. The patient submits it to their insurer.

Check the result The saved PDF has the correct patient, providers, services, dates, codes, and payment amounts.

COVERS

2 sessions across 3 invoices

Aug 8, 2026 – Aug 28, 2026

Finalized sessions only.

REIMBURSEMENT

One detail to add

A diagnosis code

Saved to their treatment plan — asked once.

Diagnosis

F41.1

Generalized anxiety disorder

Save

Example missing-diagnosis prompt. Enter the patient's documented diagnosis, not the placeholder shown.

Note On file or Already covered refers to a saved document, not delivery. Later chart edits and payments do not update that PDF. If it needs correction, contact support@coralehr.com before sharing.

RELATED TASKS

If a superbill still has missing details / 29

Create a superbill for a period / 26

If a superbill still has missing details

CoralEHR asks for confirmation if you try to generate a superbill with missing reimbursement details.

START Superbill review > Generate superbill

Some details are still missing. Generate it anyway?

Go back

Generate anyway

The confirmation offers Go back or Generate anyway when required reimbursement details are missing.

- 1 Read the missing-details panel**
Check patient details, provider details, codes, and service information against the actual records.
- 2 Choose Go back**
If this confirmation appears, Go back returns to the review. Fill the offered fields and Save, or correct the underlying record.
- 3 Fix details before generating**
Generate anyway saves a document with the omissions. Choose Go back and complete the missing fields before generating.
- 4 If you already generated it**
Download and inspect the saved PDF. Chart corrections do not update it. Contact support@coralehr.com if it needs correction, and review each document when several clinicians are involved.

Check the result You have reviewed a complete and accurate PDF before sharing it.

Note If a period is too large, choose shorter ranges and check Covers for overlap. If generation fails for several clinicians, reopen the same period and check which documents are already on file before retrying.

RELATED TASKS

Check a superbill before sharing / 28

Create a superbill for a period / 26

Create and sign a clinical note

Notes are part of the clinical chart. You can also open Notes from inside the patient's chart.

START Patient List > Note > New Note

1 Choose a note format

Click New Note and choose the format you need, such as Blank Note, SOAP Note, DAP Note, or Intake Note.

2 Write and review

Check the patient and note details. Complete the relevant fields, review the text, and wait for the save status before leaving.

3 Keep unfinished work as a draft

A saved draft can be reopened for editing. Do not sign until the record is ready.

4 Sign the finished note

Click Sign Note. In Sign Clinical Note, review the linked appointment and enter your Electronic Signature. All treatment-plan suggestions are optional.

5 Check the linked visit

The dialog explains whether signing will mark a linked session complete. Choose the correct appointment if linking one.

6 Confirm

Complete the signing action and check that the note is Signed.

Check the result The note is saved with the intended draft or signed status.

-  **Blank Note**
Start with a blank note
-  **SOAP Note**
Subjective, Objective, Assessment, Plan
-  **DAP Note**
Data, Assessment, Plan
-  **BIRP Note**
Behavior, Intervention, Response, Plan
-  **Intake Note**
Biopsychosocial assessment (13 sections)
-  **Crisis Note**
SI/Hi risk assessment & safety planning
-  **Contact Note**
Phone, email, or brief contact
-  **Couples/Family Note**
Multi-person therapy session
-  **CBIT Session Note**
Tic distress per-tic, components, interventions
-  **EMDR Session Note**
Target, NC/PC, SUD/VOC, BLS, closure

New Note offers several formats. Choose the one appropriate for your documentation.

Note Signing locks the clinical record. Review the text and linked appointment first; signing can also change the appointment's completion and billing workflow.

RELATED TASKS

If note signing needs a treatment plan / 31

Assign forms to a patient / 32

If note signing needs a treatment plan

AI treatment-plan suggestions are optional. This extra step appears when you enable them during signing.

START Sign Clinical Note > AI treatment-plan suggestions

- 1 Select an active plan**
If you want suggestions, select the active treatment plan that they should apply to.
- 2 No active treatment plan**
Click Back and turn off AI treatment-plan suggestions to sign without them.
- 3 Review and sign**
Check the note, Electronic Signature, and any linked appointment before completing the signing action.
- 4 Confirm the saved state**
Check that the note is Signed. Review the linked appointment and resulting billing work separately.

Check the result The note is signed with the options you intended.

Note Signing locks the clinical record. An optional suggestion step is not a reason to create an unrelated treatment plan or sign an unfinished note.


Choose Treatment Plan

Choose which active treatment plan should receive AI-generated update suggestions after this note is signed.

No active treatment plans are available for suggestions. Go back and uncheck AI suggestions to sign this note without generating updates.

 **Signing Note**
Signing a note locks the content and adds your electronic signature with a timestamp. This action cannot be undone.

Back
Generate Suggestions

With no active treatment plans, click Back and turn off AI suggestions to sign without them.

RELATED TASKS

Create and sign a clinical note / 30

Change or finish an appointment / 9

Assign forms to a patient

Open the patient's chart to assign a form or a packet of forms for them to complete.

START Patient chart > Forms & Documents > Assign Form

Assign Forms lets you check the patient, forms, due date, and notification choice.

1 Open assignment

In the patient's Forms & Documents, click Assign Form. Confirm the selected patient.

2 Choose the forms

Search or browse the available assessments, custom forms, and documents. Select the items you want to assign.

3 Add the packet details

Review Packet Name and Instructions. Due Date is optional; choose today or a future date if needed.

4 Choose whether to notify

Review Send one packet notification to each patient. It is selected by default; leaving it selected requests a notification.

5 Assign

Click Assign Form for one item, or Assign Packet for several. Review the result for successful and failed assignments.

6 Follow up

Use Assigned to check pending forms and Completed to review finished responses. Retry only failed items if the result offers that option.

Check the result The intended forms appear under Assigned, and you have checked the assignment/notification result.

Note Assignment and notification are separate outcomes. A successful assignment does not prove the patient received an email or completed the form. Fill Form is a different action from assigning it to the patient.

RELATED TASKS

Set your availability / 33

Set your availability

Availability controls the times patients can request or book. Review the time zone as well as the hours.

START Availability

1 Set Weekly hours

Choose the days you are available and enter the start and end times for each time block.

2 Add exceptions

Use Specific dates for time off or date-specific availability.

3 Review Booking rules

Check the booking settings that control which times can be offered.

4 Preview the result

Check the displayed duration and dates. Preview includes unsaved changes. Patients still see saved hours until Save changes succeeds.

5 Save

Click Save changes. If saving fails, use Retry and confirm the saved state before leaving.

Check the result Save changes succeeds and the page no longer shows unsaved changes. Check the preview for the intended dates and duration.

What clients see

Projected from what is on screen, including changes you have not saved.

Session length

45 min

Unsaved — clients still see your saved hours.

<

Sep 14 – Sep 20, 2026

>

M	T	W	T	F	S	S
14	15	16	17	18	19	20

Monday, September 14

3:45 PM – 6:00 PM

> Show times

3 times

Next 4 weeks · 199 open times (+8 unsaved)

Preview shows the hours currently on screen. The Unsaved notice explains that patients still see saved hours.

Note To move or cancel an existing appointment, open it in Calendar. Changing availability only changes the times offered for booking.

RELATED TASKS

When something does not work / 34

When something does not work

Start with the item you are working on and check its current status before retrying.

START Quick troubleshooting

1 The patient cannot find an invitation

Confirm their email in Edit demographics, ask them to check spam/junk, then use the portal invite resend or retry action.

2 Join is missing or the call will not open

Check the appointment's delivery mode and time. Allow pop-ups and browser camera/microphone access. Close other apps using the device if necessary.

3 Stripe setup is incomplete

Open Revenue, review the account status, and use Complete Onboarding or View Dashboard for the outstanding requirements.

4 An invoice cannot be sent

Check the email address, invoice status, remaining balance, Stripe readiness, and any on-screen explanation. Fix the existing invoice rather than duplicating it.

5 The patient paid, but the invoice still looks unpaid

Refresh the invoice and review payment status. Do not submit another payment or manually record the same payment while its outcome is uncertain.

6 A patient is absent from Superbills

Open their source invoice. Save and issue it if still unfinished or Draft, then select a period containing its service dates. Cancelled invoices are excluded. A loading error needs Try again; it does not mean there are no services.

7 The superbill has missing details

Use the readiness panel to correct the underlying information, then review the PDF. Check the service dates and that source invoices are finalized.

8 You need more help

Contact support@coralehr.com or use Book a call in CoralEHR. Include the action, time, and error message. Keep card details and unnecessary patient information out of your support message.

Note Your practice's permissions and enabled features can change which controls you see. This guide describes the interface reviewed on 13 September 2026.

RELATED TASKS

Find your way around / 4