SimplePractice Payroll Spreadsheet Instructions

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Setting up the spreadsheet

Only need to do this one time

Generate client / clinician list for the Reference Tab

Reports / Appointment Status / set date range for the whole year

Click the CSV button to the top-right

Copy and paste columns B and C into the payroll spreadsheet's Reference tab

Input your clinicians

Enter clinician names into Column S on the spreadsheet

- Should be in the same format as in reference tab (usually First Name Last Name)

Set your rate (% to pay clinicians)

- Cell U10 on the spreadsheet

Running payroll

Run report: Billing / Export Transactions for payroll start and end date and paste data into first section

Run report: Reports / Insurance / Payment Reports for payroll start and end date and paste data into second section

Check for N/A in Clinician column:

- Ignore if it's next to an insurance payment in the first section
- if you see N/A next to a client payment then copy and past the client name into the reference tab and add the clinician name next to them

Check that the CHECKSUM equals SUM in the third section. If they are equal then proceed. If not:

- Check for any missing N/A entries in the clinician columns
- Check for missing insurance payments in Insurance / Payments

If CHECKSUM and SUM are equal, then you can go ahead and pay your clinicians the amounts shown in the "pay to clinicians" column