

FREE DOWNLOAD

Psychologist invoice and receipt template

An invoice and a receipt with the details medical schemes ask for.

What this is

A one-page invoice and a one-page receipt for private practice. Both carry the details schemes need on a claim: the practice number, the member's membership number, the patient's name, the date of treatment, the tariff code and the ICD-10 code for each line, and the amount claimed. There is also an Excel version that adds up the totals for you.

How to use it

- Replace every highlighted [placeholder] with your own details, then save your practice details once as your master copy.
- Make a fresh copy for every invoice. Give the receipt to the client when they pay: it is proof of payment for a refund claim.
- Delete this page and the last page before you send anything to a client.

Before you use it

Check the field names with your billing practitioner or the schemes you claim from. Requirements can change.

Registered Counsellors use Z-codes (the reason for the visit) and not F-codes, because they do not diagnose. Psychologists may use both.

Late cancellation and no-show fees are charged to the client directly and are not claimed from the medical aid.

Registered for Value-Added Tax? Add your VAT number and change the heading to "Tax invoice". This is a template, not tax or legal advice, and it is not approved by the Health Professions Council of South Africa.

What we checked

- Discovery Health, details needed to submit a claim: membership number, patient name, provider name, practice number, account number, treatment date, tariff codes and an ICD-10 code for each line, amount claimed. Refund claims need an invoice and proof of payment. [Discovery Health](#)
- Momentum Health, how to submit a medical aid claim: membership and patient details, date of treatment, amount charged, clinical codes and practice number. [Momentum Health](#)

Last checked: 2 October 2026. General information only, not legal or professional advice. Not approved or endorsed by the Health Professions Council of South Africa.

[Practice name]

[Practice address] · [Telephone] · [Email]

Invoice

Practitioner name

Invoice number

Invoice date

Profession and HPCSA registration number

Practice number

Account number

VAT number (if registered)

Due date

Patient and medical aid

Patient name

Patient ID number or date of birth

Main member name

Membership number

Dependant code

Medical scheme and option

Services

Date of session	Description	Tariff code	ICD-10 code	Qty	Amount (R)
-----------------	-------------	-------------	-------------	-----	------------

--

--

--

Total (R)

Paid to date (R)

Balance due (R)

How to pay

Account name

Bank and branch code

Account number

Payment reference

Medical aid clients: please pay this account yourself and claim back from your scheme, attaching the receipt as proof of payment. Fees for late cancellations and missed sessions are not covered by medical aids.

[Practice name]

[Practice address] · [Telephone] · [Email]

Receipt

Receipt number

Receipt date

For invoice number

Practitioner name

Practice number

Profession and HPCSA registration number

VAT number (if registered)

Received from

Patient name

Paid by (if different)

Payment

Invoice total (R)

Paid before this payment (R)

Amount received now (R)

Balance still owing (R)

Date received

Payment method (EFT, card, cash, medical aid)

Received with thanks. This receipt is proof of payment. Medical aid clients can attach it, with the invoice, to a refund claim.

Signed or issued by

Date

MEDICAL AID BILLING AND INVOICING

Tired of doing this manually?

Try *Wholistic Private Practice*

Typing every invoice and receipt by hand is slow, and one missing code means a rejected claim. In **Wholistic Private Practice**, the invoice builds itself from the session.

- **Invoices filled in for you**, with your practice number, the ICD-10 code and the tariff code on every line.
- **Claims and follow-ups tracked**, so you can see which are paid, pending or rejected.
- **Receipts created when payment comes in**, with the balance updated automatically.

See Medical aid billing and invoicing →

Or visit wholisticprivatepractice.com

Free for up to 5 active clients. Join the waiting list to lock in the R39 per month founding rate. No per-claim fees and no percentage of your income.

Built by Sumarie Engelbrecht, a Registered Counsellor in active practice in Mbombela, for South African psychologists and Registered Counsellors.