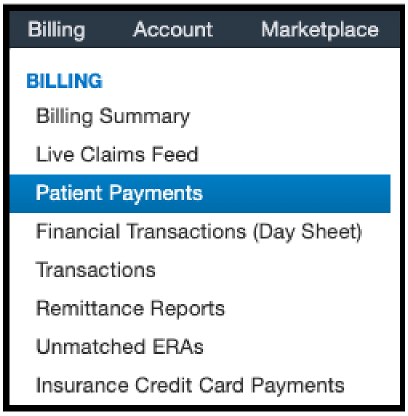
How to Run an Unallocated Payment Report

07/24/2024 4:55 pm EDT

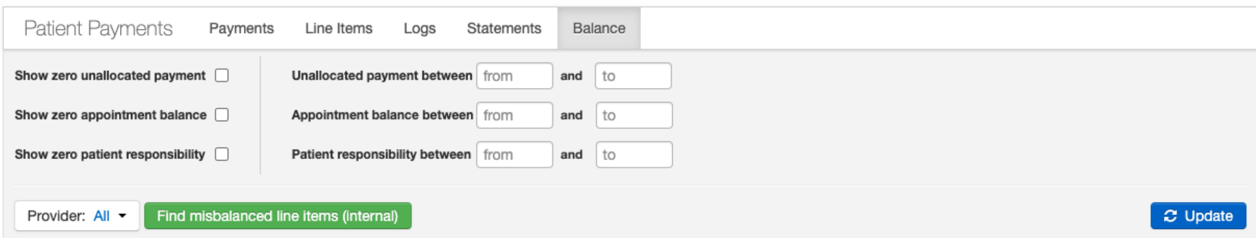
In DrChrono, patients can have an unallocated payment amount on their account. These would be payments posted to their account but are not attached to a specific appointment. These payments would be prepayments for service and could be utilized for any appointment; past, present, or future.

Here is how you can run a report to see all patients with unallocated payments.

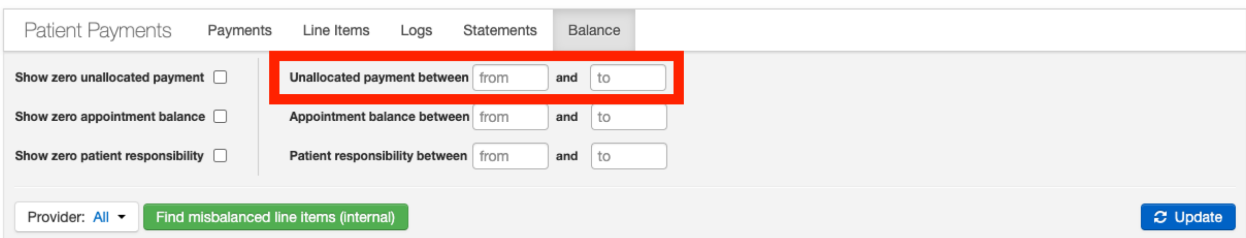
- Navigate to **Billing > Patient Payments**



- Select the **Balance** tab



- Enter the dollar range that you would like to see. If you would like to see all unallocated payments, you can enter 1 in the **from** box and leave the **to** box empty. Once you have selected your dollar range, click on **Update**.



- If you would like to export the report, click the **Export to File** button.
- When the report has been generated, it will appear in the message center (envelope icon at the top right of the page).
- Click **Generated Sheet: Patient Payments** under Incoming Messages. There you will have the option to save

to the patient's chart or download the document.