

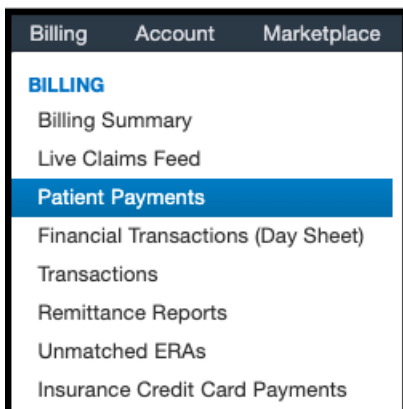
How to Run an Unallocated Payment Report

07/24/2024 4:55 pm EDT

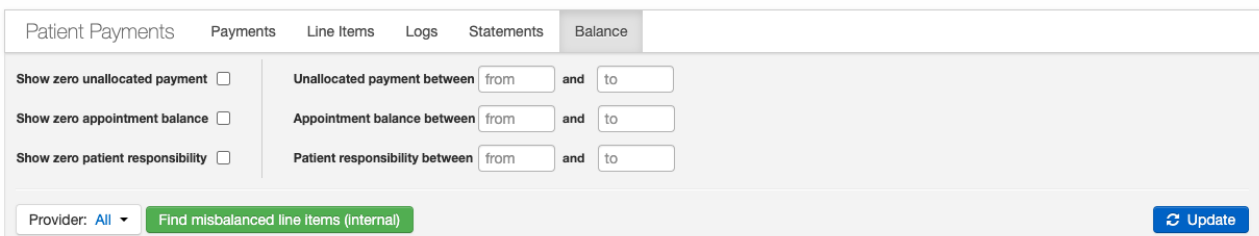
In DrChrono, patients can have an unallocated payment amount on their account. These would be payments posted to their account but are not attached to a specific appointment. These payments would be prepayments for service and could be utilized for any appointment; past, present, or future.

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

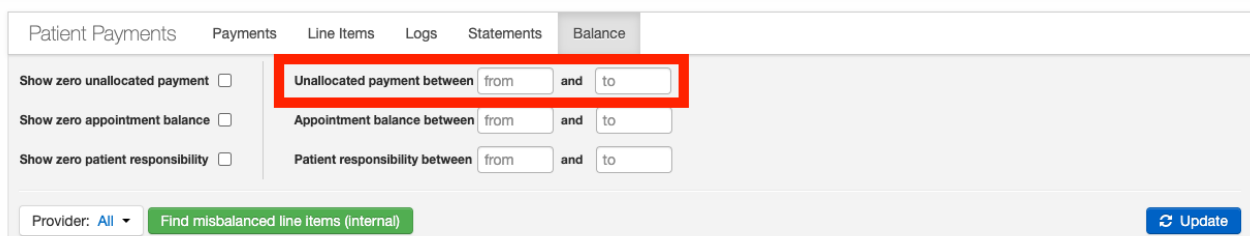
- Navigate to **Billing > Patient Payments**



- Select the **Balance** tab

A screenshot of the 'Patient Payments' interface in the 'Balance' tab. The interface has a header with tabs: 'Patient Payments', 'Payments', 'Line Items', 'Logs', 'Statements', and 'Balance'. Below the header, there are three rows of filters, each with a checkbox and a range selector: 'Show zero unallocated payment' with 'Unallocated payment between' and 'from' and 'to' boxes; 'Show zero appointment balance' with 'Appointment balance between' and 'from' and 'to' boxes; and 'Show zero patient responsibility' with 'Patient responsibility between' and 'from' and 'to' boxes. At the bottom, there is a 'Provider: All' dropdown, a green button labeled 'Find misbalanced line items (Internal)', and a blue 'Update' button.

- 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**.

A screenshot of the 'Patient Payments' interface in the 'Balance' tab, similar to the previous one. In this version, the 'Unallocated payment between' range selector (the 'from' and 'to' boxes) is highlighted with a red rectangular box. The other elements of the interface, including the checkboxes and the 'Update' button, are the same as in the previous screenshot.

- 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.
