

Apply money from unallocated to the appointment while in the Live Claims Feed

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When you are working on patient appointments in the Live Claims Feed, you may notice that a patient has money in their unallocated that would either pay off or pay towards another appointment. You can easily move the money while in the appointment in the Live Claims Feed.

Here's how:

1. Click on the Dollar sign on the line item where you would like to apply the patient's unallocated money.

Pt Bal	Status/Adj Type	
0 \$150.00	! Balance Due	
0 \$150.00	Balance Due	

2. A **Fill Line Item** window will open. It will list all available payments that are included in the patient's unallocated amount. If separate payments were made or if they were made on different dates, they will be listed separately.

Fill Line Item

Posted Date	Payment Date	Appt.	Applied	Available	<input type="checkbox"/>
Oct 21, 2020	Oct 21, 2020			\$150.00	<input type="checkbox"/>
Oct 21, 2020	Oct 21, 2020			\$75.00	<input type="checkbox"/>

Applied: \$ 0 out of \$125.00 balance

- You can select which payment to use by clicking on the check box to the right of the payment

Fill Line Item

Posted Date	Payment Date	Appt.	Applied	Available	<input type="checkbox"/>
Oct 21, 2020	Oct 21, 2020			\$150.00	<input type="checkbox"/>
Oct 21, 2020	Oct 21, 2020		\$75.00	\$75.00	<input checked="" type="checkbox"/>

Applied: \$ 75 out of \$125.00 balance

Or you can click on the box next to the word Available and the system will apply the amounts from the top listed

down, until the amount due on the appointment is met. As shown in this example, only \$125 was owed by the patient, so only \$125 was taken from the \$150 unallocated payment. The remaining funds will stay in the patient's unallocated fund.

Fill Line Item ×

Posted Date	Payment Date	Appt.	Applied	Available	<input checked="" type="checkbox"/>
Oct 21, 2020	Oct 21, 2020		\$125.00	\$150.00	<input checked="" type="checkbox"/>
Oct 21, 2020	Oct 21, 2020			\$75.00	<input type="checkbox"/>

Applied: \$ 125 out of \$125.00 balance

Once you have selected which payments to use, click on **Apply** and the system will make the updates.
