Payments tab under Patient Payments

07/24/2024 7:25 pm EDT

Let's explore what the column headings represent under Patient Payments. They are denoted by the blue box below.

You can navigate to the screen below by going to **Billing > Patient Payments.** Click on the Payments tab and select a patient by typing their name into the search box.

Schedule Clinical Patie	ents Reports Billing	Account Help	o ∳	×,					Search	ı	6	
Billing Summary	Patient Payment	S Payments	Line Items	Logs Statem	ients Bala	ance					•	Feedback
Live Claims Feed		Ŧ										
Patient Payments (beta)	From	Filte	er by Range: \$	- \$		Provider: Al						
Day Sheet												
Transactions	Simple: On Conc	lensed: On										C Update
Remittance Reports		То	Total Paid Allocated Pay		ent Unallocated Payment		Statement Balance			Total Balance		
Unmatched ERAs	Jenny Harris	\$1	,921.00	21.00 \$1,932.00		-\$11.00		\$83.00		\$94.00		
Accounts Receivable	Print/Export - A	dd										
	Print/Export - + A		Payment Date	Appointment	Line Item	Provider	Payment Method	Туре	Notes	Amount	Total	
Patient Statements			Payment Date Jun 27, 2018	Appointment 6/27/2017 10:00AM	Line Item 0299T	Provider Dane Rasmuson	Payment Method Debit	Type Credit	Notes	Amount \$2,000.00	Total	Receip
Patient Statements Product / Procedure	# Unallocate • 0 \$0.00 • 2 \$0.00	d Posted Date Jun 27, 2018 Jun 27, 2018	Jun 27, 2018 Jun 27, 2018	6/27/2017 10:00AM 6/27/2017 10:00AM		Dane Rasmuson Dane Rasmuson		Credit Refund		\$2,000.00 -\$70.00	•	Receip
Patient Statements Product / Procedure Balance / Ledger	# Unallocate • 0 \$0.00 • 2 \$0.00 • 0 \$10.00	d Posted Date Jun 27, 2018 Jun 27, 2018 Jun 27, 2018	Jun 27, 2018 Jun 27, 2018 Jun 27, 2018	6/27/2017 10:00AM		Dane Rasmuson Dane Rasmuson Dane Rasmuson	Debit	Credit Refund Credit	0	\$2,000.00 -\$70.00 \$10.00	•	 ⊖Receip ⊖Receip
Patient Statements Product / Procedure Balance / Ledger Fee Schedule	# Unallocate • 0 \$0.00 • 2 \$0.00 • 0 \$10.00 • 0 \$10.00	Posted Date Jun 27, 2018 Jun 27, 2018 Jun 27, 2018 Mar 28, 2018	Jun 27, 2018 Jun 27, 2018 Jun 27, 2018 Mar 28, 2018	6/27/2017 10:00AM 6/27/2017 10:00AM		Dane Rasmuson Dane Rasmuson Dane Rasmuson Dane Rasmuson		Credit Refund Credit Other	0	\$2,000.00 -\$70.00 \$10.00 -\$100.00	0	 ⇒Receip ⇒Receip ⇒Receip
Patient Statements Product / Procedure Balance / Ledger Fee Schedule	# Unallocate • 0 \$0.00 • 2 \$0.00 • 0 \$10.00 • 0 -\$100.00 • 1 \$5.00	Posted Date Jun 27, 2018 Jun 27, 2018 Jun 27, 2018 Mar 28, 2018 Mar 21, 2018	Jun 27, 2018 Jun 27, 2018 Jun 27, 2018 Mar 27, 2018 Mar 28, 2018 Mar 21, 2018	6/27/2017 10:00AM 6/27/2017 10:00AM		Dane Rasmuson Dane Rasmuson Dane Rasmuson Dane Rasmuson Dane Rasmuson	Debit Patient Payments	Credit Refund Credit Other Credit	0 0	\$2,000.00 -\$70.00 \$10.00 -\$100.00 \$5.00		
Patient Statements Product / Procedure Balance / Ledger Fee Schedule Underpaid Items	# Unailceate • 0 \$0.00 • 2 \$0.00 • 0 \$10.00 • 0 \$10.00 • 0 \$5.00 • 1 \$5.00 • 1 \$5.00	d Posted Date Jun 27, 2018 Jun 27, 2018 Jun 27, 2018 Mar 28, 2018 Mar 21, 2018 Mar 21, 2018	Jun 27, 2018 Jun 27, 2018 Jun 27, 2018 Mar 28, 2018 Mar 21, 2018 Mar 21, 2018	6/27/2017 10:00AM 6/27/2017 10:00AM 6/26/2017 10:45AM	0299T	Dane Rasmuson Dane Rasmuson Dane Rasmuson Dane Rasmuson Dane Rasmuson	Debit Patient Payments Credit Card	Credit Refund Credit Other Credit Credit	0 0 0	\$2,000.00 -\$70.00 \$10.00 -\$100.00 \$5.00 \$5.00		AReceip AReceip AReceip AReceip AReceip
Accounts Receivable Patient Statements Product / Procedure Balance / Ledger Fee Schedule Underpaid Items Adjustment Master Sales Tax	# Unallocate • 0 \$0.00 • 2 \$0.00 • 0 \$10.00 • 0 -\$100.00 • 1 \$5.00 • 1 \$5.00	Posted Date Jun 27, 2018 Jun 27, 2018 Jun 27, 2018 Mar 28, 2018 Mar 21, 2018	Jun 27, 2018 Jun 27, 2018 Jun 27, 2018 Mar 27, 2018 Mar 28, 2018 Mar 21, 2018	6/27/2017 10:00AM 6/27/2017 10:00AM		Dane Rasmuson Dane Rasmuson Dane Rasmuson Dane Rasmuson Dane Rasmuson	Debit Patient Payments	Credit Refund Credit Other Credit	0 0	\$2,000.00 -\$70.00 \$10.00 -\$100.00 \$5.00		AReceip AReceip AReceip AReceip AReceip AReceip

Total Balance = SUM (Patient Responsibility) - Total Payment

Total Paid = Allocated Payment + Unallocated Payment

Statement Balance = SUM(Patient Responsibility) - Allocated Payment

Allocated Payment = those payments that are assigned or attached to a patient appointment

Unallocated Payment = those payments that are not assigned or attached to a particular patient appointment. They hold in a "bucket" of sorts to be used for future appointments.

All of the patient's payments will be shown here, along with how they were allocated. If a patient made a large prepayment and it was used for multiple office visits, you can see all of the details by clicking on the black arrow on the left of the row that corresponds with the payment. All of the details will be listed. If there are still funds available for use (unallocated), the bubble will be red. Once all funds for that payment have been allocated or used for a visit/service, the bubble will turn gray.