

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.

	Total Paid	Allocated Payment	Unallocated Payment	Statement Balance	Total Balance
Jenny Harris	\$1,921.00	\$1,932.00	-\$11.00	\$83.00	\$94.00

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
0	\$0.00	Jun 27, 2018	Jun 27, 2018	6/27/2017 10:00AM	0299T	Dane Rasmuson	Debit	Credit		\$2,000.00	
2	\$0.00	Jun 27, 2018	Jun 27, 2018	6/27/2017 10:00AM		Dane Rasmuson		Refund		-\$70.00	
0	\$10.00	Jun 27, 2018	Jun 27, 2018	6/26/2017 10:45AM		Dane Rasmuson		Credit		\$10.00	
0	-\$100.00	Mar 28, 2018	Mar 28, 2018			Dane Rasmuson	Patient Payments	Other		-\$100.00	
1	\$5.00	Mar 21, 2018	Mar 21, 2018			Dane Rasmuson		Credit		\$5.00	
1	\$5.00	Mar 21, 2018	Mar 21, 2018			Dane Rasmuson	Credit Card	Credit		\$5.00	
1	\$5.00	Mar 21, 2018	Mar 14, 2018	6/25/2017 11:00AM	PHONE	Dane Rasmuson	Cash	Credit		\$5.00	
1	\$0.00	Mar 20, 2018	Mar 20, 2018			Dane Rasmuson	Visa	Credit		\$2.00	
0	\$1.00	Mar 20, 2018	Mar 20, 2018			Dane Rasmuson	onpatient	Credit		\$1.00	

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.