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 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.