

Balance tab under Patient Payments

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The **Balance** tab provides greater ability to narrow down your search results, and export capabilities.

You can navigate to this screen by clicking on Billing > Patient Payments > Balance tab.

You can search for patients with unallocated amounts and appointment balances between a range that you select. Once you have identified the patients, you can export the information into a report by clicking on **Export to File**. Once generated, the report will be available in your message center.

Patient Payments Payments Line Items Logs Statements **Balance**



Show zero unallocated payment Unallocated payment between and

Show zero appointment balance Appointment balance between and

Show zero patient responsibility Patient responsibility between and

Provider: All ▾

Export to File

Patient Name	Chart ID	Patient Status
 Jenny (Jen) Harris	HAJE000001	A
 Jenny Harris	HAJE000002	A

Please note, that the patient shown in the image above is a sample patient with test data.