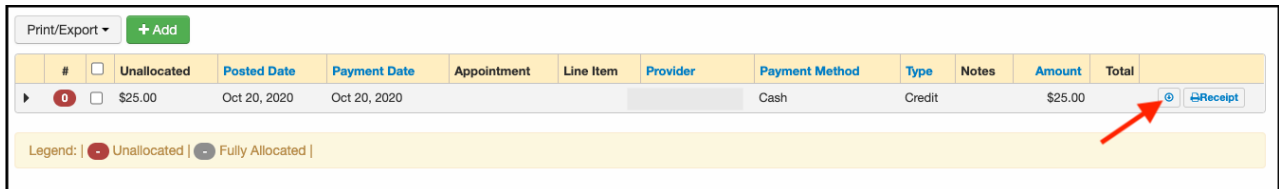


Apply money from unallocated to the appointment while in Patient Payments

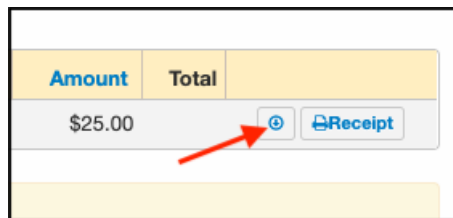
Last modified on 10/11/2024 9:46 am EDT

To move money from Unallocated Payment and associate it with an appointment, click on the circle over on the right of the payment amount, sometimes referred to as a radio button.



The screenshot shows a table with columns: #, Unallocated, Posted Date, Payment Date, Appointment, Line Item, Provider, Payment Method, Type, Notes, Amount, Total. A red arrow points to a radio button next to the Amount column for a \$25.00 payment. Below the table is a legend: Legend: | Unallocated | Fully Allocated |

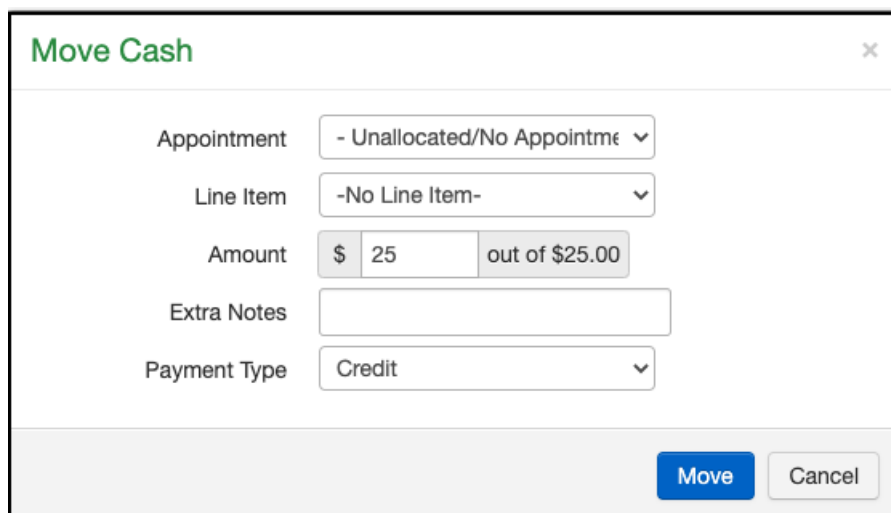
#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
▶ 1	<input checked="" type="checkbox"/>	\$25.00	Oct 20, 2020	Oct 20, 2020			Cash	Credit		\$25.00	



A close-up of the table row showing the Amount (\$25.00) and Total columns. A red arrow points to the radio button next to the Amount column. A 'Receipt' button is visible to the right.

Amount	Total
\$25.00	

Once you click on the radio button, a **Move Cash** window will open. This will allow you to select the appointment and the line item (CPT, HCPCS, or Custom Code), as well as the amount to transfer.



The 'Move Cash' dialog box contains the following fields:

- Appointment: - Unallocated/No Appointment
- Line Item: -No Line Item-
- Amount: \$ 25 out of \$25.00
- Extra Notes: (empty text box)
- Payment Type: Credit

Buttons: Move, Cancel

For the example below, even though the patient has \$25 in their unallocated cash, we can choose only to move \$5 or \$10 of it and leave the remaining unallocated, or use it for a different appointment.

To change the amount, just click on the box on the **Amount** line and adjust it to fit the situation.

Once all fields are filled in, click on **Move** and the system will move the payment as you have requested.
