

# Apply money from unallocated to the appointment while in Patient Payments

07/08/2024 7:24 pm EDT

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

Print/Export + Add

#	<input type="checkbox"/>	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total	
▶	<input checked="" type="checkbox"/>	\$25.00	Oct 20, 2020	Oct 20, 2020				Cash	Credit		\$25.00		<input checked="" type="radio"/> <span style="border: 1px solid #ccc; padding: 2px 5px;">Receipt</span>

Legend: |  Unallocated |  Fully Allocated |

Amount	Total	
\$25.00		<input checked="" type="radio"/> <span style="border: 1px solid #ccc; padding: 2px 5px;">Receipt</span>

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.

- 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.

### Move Cash ×

Appointment:

Line Item:

Amount:  out of \$25.00

Extra Notes:

Payment Type:

Move Cancel

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