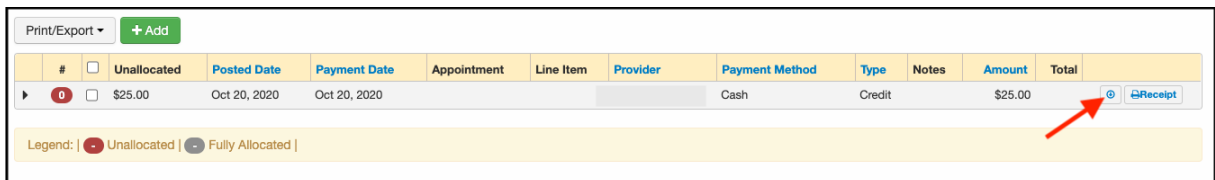


Apply money from unallocated to the appointment while in Patient Payments

Last modified on 02/25/2025 2:54 pm EST

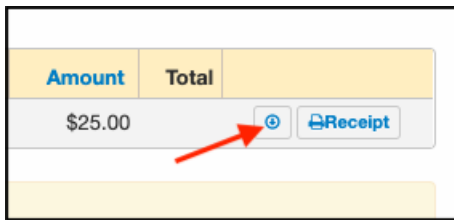
To move money from Unallocated Payment and associate it with an appointment:

1. Press the circle over on the right of the payment amount sometimes referred to as a radio button.



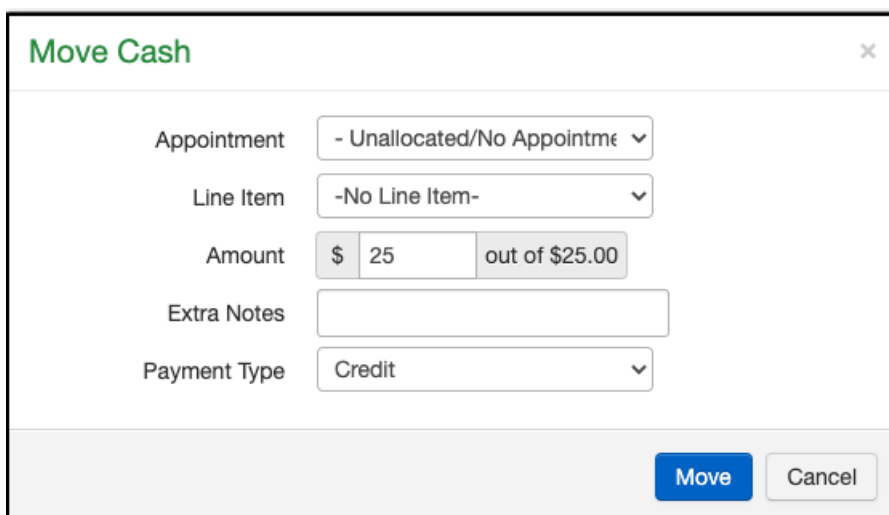
#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total	
▶ 0	<input type="checkbox"/>	\$25.00	Oct 20, 2020	Oct 20, 2020			Cash	Credit		\$25.00		<input type="radio"/> Receipt

Legend: | Unallocated | Fully Allocated |



Amount	Total	
\$25.00		<input type="radio"/> Receipt

2. 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.



Move Cash

Appointment:

Line Item:

Amount: out of \$25.00

Extra Notes:

Payment Type:

3. 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.
 - a. To change the amount, just press on the box on the **Amount** line and adjust it to fit the situation.

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