## **Payments tab under Patient Payments**

Last modified on 05/20/2025 2:22 pm EDT

Let's explore what the column headings represent under Patient Payments. They are denoted by the blue box below.

- 1. Navigate to **Billing > Patient Payments.**
- 2. Press on the Payments tab and select a patient by typing their name into the search box.

	+												
rom	То	Filter by	Range: \$	- \$	Provi	ider: All 👻							
Simple	e: On Con	densed: On	Internal: Off										C Upda
Total Paid		Allocated Pag	Allocated Payment (Paid to Appt)		ayment	Statement Balance		Total Balance					
a Adams		\$490.00		\$290.00	\$200.00		\$100.00		-\$115.00			C Auto Fill	
	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Туре	Notes	Amount	Total		
#			May 0, 2022	4/19/2022 12:00AM			Cash	Credit		\$50.00		۲	🖶 Receipt 🕶
# []	\$50.00	May 9, 2023	Way 9, 2023										
# 0 0 0	\$50.00 \$0.00	May 9, 2023 Dec 18, 2020	Dec 18, 2020				Cash	Credit		\$170.00		۲	🖶 Receipt 🕶
#        1        2        12	\$50.00 \$0.00 \$5.00	May 9, 2023 Dec 18, 2020 Dec 18, 2020	Dec 18, 2020 Dec 18, 2020	11/19/2020 11:00AM			Cash Cash	Credit Credit		\$170.00 \$20.00		•	BReceipt •
#        0        2        12        1	\$50.00 \$0.00 \$5.00 \$0.00	May 9, 2023 Dec 18, 2020 Dec 18, 2020 Oct 21, 2020	Dec 18, 2020 Dec 18, 2020 Oct 21, 2020	11/19/2020 11:00AM			Cash Cash Cash	Credit Credit Credit		\$170.00 \$20.00 \$75.00		•	Receipt  Receipt  Receipt
#        0        2        12        12        4	\$50.00 \$0.00 \$5.00 \$0.00 \$125.00	May 9, 2023 Dec 18, 2020 Dec 18, 2020 Oct 21, 2020 Oct 21, 2020	Dec 18, 2020 Dec 18, 2020 Oct 21, 2020 Oct 21, 2020	11/19/2020 11:00AM			Cash Cash Cash Cash	Credit Credit Credit Credit		\$170.00 \$20.00 \$75.00 \$150.00		•	Receipt  Receipt  Receipt  Receipt  Receipt

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 pressing 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.