

Payments tab under Patient Payments

Last modified on 03/19/2026 2:33 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.

The screenshot shows the 'Patient Payments' interface. At the top, there are tabs for 'Patient Payments', 'Payments', 'Line Items', 'Logs', 'Statements', and 'Balance'. Below the tabs is a search area with a 'Patient' dropdown, 'From' and 'To' date fields, a 'Filter by Range' field with dollar signs, and a 'Provider: All' dropdown. There are also buttons for 'Simple: On', 'Condensed: On', and 'Internal: Off', along with an 'Update' button.

Below the search area is a summary table for 'Tina Adams':

	Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment	Statement Balance	Total Balance
Tina Adams	\$490.00	\$290.00	\$200.00	\$100.00	-\$115.00

Below the summary table is a 'Print/Export' dropdown and a '+ Add' button. The main part of the interface is a detailed payment list table:

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
▶ 0	<input type="checkbox"/>	\$50.00	May 9, 2023	May 9, 2023	4/19/2022 12:00AM		Cash	Credit		\$50.00	
▶ 2	<input type="checkbox"/>	\$0.00	Dec 18, 2020	Dec 18, 2020			Cash	Credit		\$170.00	
▶ 12	<input type="checkbox"/>	\$5.00	Dec 18, 2020	Dec 18, 2020	11/19/2020 11:00AM		Cash	Credit		\$20.00	
▶ 1	<input type="checkbox"/>	\$0.00	Oct 21, 2020	Oct 21, 2020			Cash	Credit		\$75.00	
▶ 4	<input type="checkbox"/>	\$125.00	Oct 21, 2020	Oct 21, 2020			Cash	Credit		\$150.00	
▶ 4	<input type="checkbox"/>	\$20.00	Oct 21, 2020	Oct 21, 2020			Cash	Credit		\$25.00	

At the bottom, there is a legend: Legend: | Unallocated | Fully Allocated |

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.