

Line Items tab under Patient Payments

07/08/2024 7:42 pm EDT

To help with your office and posting efficiency, you can utilize the Fill Line Item option to help eliminate some of the manual postings.

You can navigate to this screen by clicking on Billing > Patient Payments > Line Items tab.

The **Line Items** tab will allow you to fill line items:

The screenshot displays the 'dr chrono' software interface. At the top, there's a navigation bar with 'Schedule', 'Clinical', 'Patients', 'Reports', 'Billing', 'Account', and 'Help'. The user is logged in as 'Dane Rasmuson'. The main content area is titled 'Patient Payments' and has tabs for 'Payments', 'Line Items', 'Logs', 'Statements', and 'Balance'. The 'Line Items' tab is active, showing a patient selection dropdown for 'Jenny Harris' and a 'Filter by Range' section with 'From' and 'To' fields. Below this is an 'Update' button. A summary table shows the following data:

	Total Paid	Allocated Payment	Unallocated Payment	Statement Balance	Total Balance
Jenny Harris	\$81.00	\$0.00	\$81.00	\$5.00	-\$76.00

Below the summary is a table of line items:

Date of Service	Stmts	Code	Allowed	Patient Resp	Patient Paid	Ins. Balance	Pt. Balance
6/25/2017 11:00AM		PHONE	\$5.00	\$5.00	\$0.00	\$0.00	\$5.00

A 'Fill' button is located to the right of the last row in the table. At the bottom of the interface, there are links for 'Feedback', 'Support', 'Walk Me Through', and 'Practice Chat'.

Please note, that the patient shown in the image above is a sample patient with test data.

Clicking on the **Fill** button on the right side of the screen will populate a pop-up window where you can select and apply unallocated money towards multiple appointments. Select the items you would like by clicking on the box to the right. When you are done, just click **Apply**.

Payments Line Items

Filter by Range: \$

Stmts Code PHON

Fill Line Item PHONE (\$5.00) ✕

Posted Date	Payment Date	Payment Method	Applied	Available	<input type="checkbox"/>
Mar 20, 2018	Mar 20, 2018	Cash		\$10.00	<input type="checkbox"/>
Mar 20, 2018	Mar 12, 2018	Cash		\$51.00	<input type="checkbox"/>
Mar 20, 2018	Mar 1, 2018	Check		\$2.00	<input type="checkbox"/>
Mar 20, 2018	Mar 20, 2018	onpatient		\$1.00	<input type="checkbox"/>
Mar 20, 2018	Mar 20, 2018	Visa		\$2.00	<input type="checkbox"/>
Mar 21, 2018	Mar 21, 2018			\$5.00	<input type="checkbox"/>
Mar 21, 2018	Mar 21, 2018	Credit Card		\$5.00	<input type="checkbox"/>
Mar 21, 2018	Mar 14, 2018	Cash		\$5.00	<input type="checkbox"/>

Applied: \$ 0 out of \$5.00 balance

Apply
Cancel

Statement Balance	
\$5.00	
Ins. Balance	
\$0.00	