Moving money from an appointment to a patient's unallocated

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If there is an overpayment on a patient's account, you can hold the payment in a central location for a future visit. We call it "unallocated". You can also think of it as an account you would have at a bank. The money sits there until you do something with it. The money will appear as a flag (green highlighted and appears on the left of the screen) to alert you that the patient has unallocated funds.

This is how it will appear on the patient's account:

An overpayment could happen if a patient paid a copay for a visit. However, when the claim is processed by the insurance company, they did not assign a copay for the visit, thus creating an overpayment on the appointment. You can move this money to the patient's unallocated to hold for a future visit.

For this example, we can see that the patient has overpaid for the appointment. The charge was $150, however, the patient paid $175, resulting in a $25 overpayment or a credit on the account. We can move this $25 to their unallocated so it can be used for a future visit.

1. To move it, just press on the radio button (small blue circle) to the right of the patient payment. It's highlighted in green below.
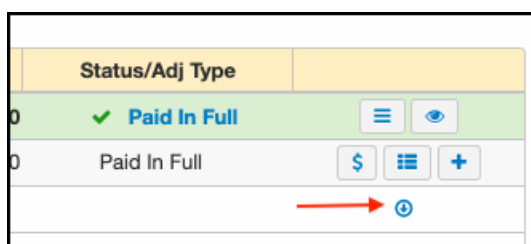
2. You will see a Move Cash window once you press on it.

3. Press on the black down arrow to the right of the Appointment line. It will show you a list of the patient's appointments (both with a balance (unpaid) and without a balance (paid)) as well as give you the option to select unallocated/no appointment.

4. Select **Unallocated/No Appointment,** which is at the top of the list.

5. Select the amount of money to move from the appointment to the patient's unallocated. For our example, we would want to enter $25.00.

6. Press **Move** to complete the transaction.

7. Now, in the patient's appointments in the Live Claims Feed (Billing > Live Claims Feed), there is a green flag on the left of the screen to alert you that the patient has unallocated money in their account.

Patient's unallocated payment $25.00

8. If a portion of the credit is moved to an appointment, the flag will update in real-time to show you how much is left in the patient's unallocated fund. If the entire amount is allocated to an appointment, the flag will update to read:

Patient does not have unallocated payment