

Balance tab under Patient Payments

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The **Balance** tab provides greater ability to narrow down your search results, and export capabilities.

1. Navigate to **Billing > Patient Payments > Balance** tab.
2. You can search for patients with unallocated amounts and appointment balances between a range that you select.
3. Once you have identified the patients, you can export the information into a report by selecting **Export to File**. Once generated, the report will be available in your message center.

The screenshot shows the 'Balance' tab interface. At the top, there are tabs for 'Patient Payments', 'Payments', 'Line Items', 'Logs', 'Statements', and 'Balance'. Below the tabs, there are three search filters: 'Show zero unallocated payment', 'Show zero appointment balance', and 'Show zero patient responsibility', each with a checkbox. To the right of these filters are three input fields for 'Unallocated payment between', 'Appointment balance between', and 'Patient responsibility between', each with 'from' and 'to' sub-inputs. Below the filters is a 'Provider: All' dropdown menu. There is an 'Export to File' button. At the bottom, there is a table with three columns: 'Patient Name', 'Chart ID', and 'Patient Status'. The table contains two rows of data.

| Patient Name | Chart ID | Patient Status |
|--------------------|------------|----------------|
| Jenny (Jen) Harris | HAJE000001 | A |
| Jenny Harris | HAJE000002 | A |

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