Patient Payments Auto Allocation FAQ

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Please see answers below to some commonly asked questions about patient payment auto allocation. If you have question(s) that are not listed below, please reach out to support or your account manager. They will be happy to assist.

Q: I have the auto-fill payments feature enabled. When are my payments auto-filled?
The system will auto-fill when it sees an insurance balance change on a line item. The auto-fill can occur within minutes of when the insurance balance changes on a given line item.

Q: What auto-allocation settings are available for me and what do they mean?

Auto allocate: By default, this option is not enabled; when this is enabled the DrChrono system will start auto-allocating payments to line items as line items accrue insurance balances or when new payments are recorded.

Auto unallocate: By default, this option is not enabled, when this is enabled our system will unallocate payments from line items with negative insurance balances.

Use other appointment payments: By default, this option is not enabled. By default (disabled), our system only applies payments to line items tied to a specific appointment if one was specified. Enabling this feature allows payments to be used with any appointment, with a preference for the one associated with the payment.

Q: What's the difference between auto-fill and auto-allocate?

Auto allocate automatically applies the payment to the existing line items at the time of payment. In other words, the application of the payments will occur at that time and will not retroactively allocate cash to line items that are created in the future for a given appointment.

Auto allocate also allows you to apply payments to line items that*do not have a patient balance yet.*

Autofill on the other hand will automatically allocate payments to line items as they are added to appointments and have an insurance balance on them. This system runs in the background and proactively allocates payments, depending on the setup of this feature.

Q: Why can't I allocate money to line items in future appointments?

We currently do not allow the allocation of payments to line items for appointments scheduled for the future.

Q: Can I migrate back to the old version if I'm on the new patient payments system?
Unfortunately no, back migration isn't supported.