Auto Fill Patient Payments

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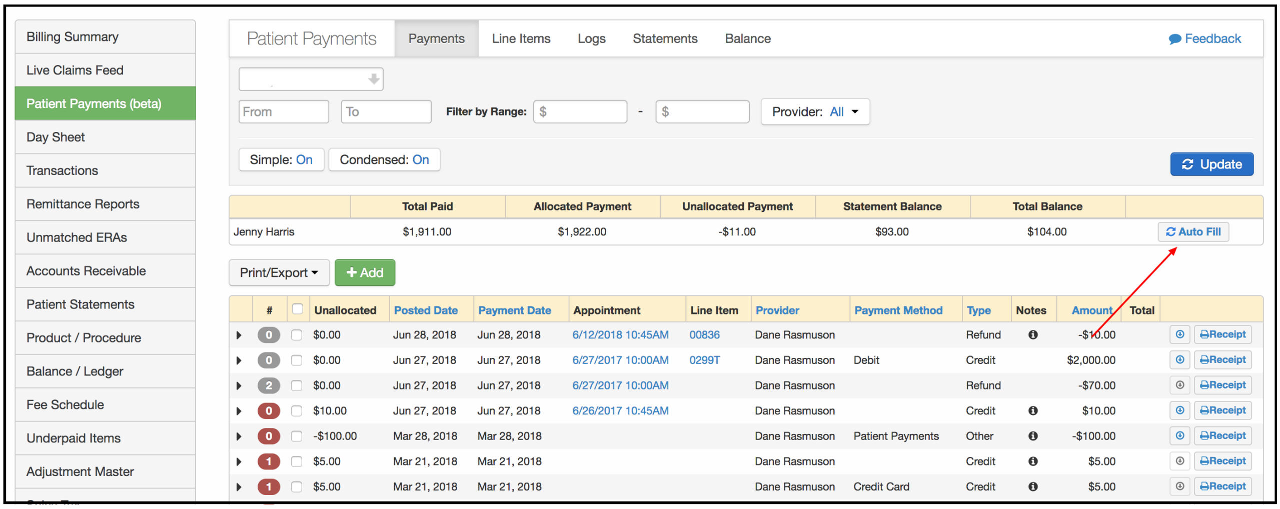
Note: Auto Allocation must be enabled by your account manager.

Once the auto allocation feature is enabled, you'll notice an **Auto fill** button toward the upper right side of the screen. The feature will have the system automatically allocate available patient funds (aka unallocated payments) to unpaid patient balances. It will save you time in that you will not have to go through and manually allocate the funds for each open balance.



Once you see that button within your account, you'll be able to auto-fill your patient balances.

Auto-Allocation Rules:

- If an appointment is associated with payment, payments will only be allocated to line items associated with that appointment. Otherwise, all payments can be auto-allocated to all appointments/all dates of service.
- The order in which the unallocated funds will be applied is to the oldest balance first.
- Payments will only be allocated to appointments if the provider has the auto allocation feature enabled and the provider is associated with the appointment.