

Auto Fill Patient Payments

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Note: Auto Allocation must be enabled by support.

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 automatically allocate available patient funds (aka unallocated payments) to unpaid patient balances. It will save you time because you will not have to manually allocate the funds for each open balance.

The screenshot displays the 'Patient Payments' section of a software interface. On the left is a sidebar menu with options like 'Billing Summary', 'Live Claims Feed', 'Patient Payments (beta)', 'Day Sheet', 'Transactions', 'Remittance Reports', 'Unmatched ERAs', 'Accounts Receivable', 'Patient Statements', 'Product / Procedure', 'Balance / Ledger', 'Fee Schedule', 'Underpaid Items', and 'Adjustment Master'. The main area has tabs for 'Patient Payments', 'Payments', 'Line Items', 'Logs', 'Statements', and 'Balance'. Below these tabs are filters for 'From', 'To', 'Filter by Range', and 'Provider'. A summary table shows 'Total Paid', 'Allocated Payment', 'Unallocated Payment', 'Statement Balance', and 'Total Balance' for 'Jenny Harris'. Below this is a table of payment entries with columns for '#', 'Unallocated', 'Posted Date', 'Payment Date', 'Appointment', 'Line Item', 'Provider', 'Payment Method', 'Type', 'Notes', 'Amount', and 'Total'. A red arrow points to the 'Auto Fill' button in the top right corner of the main area.

	Total Paid	Allocated Payment	Unallocated Payment	Statement Balance	Total Balance
Jenny Harris	\$1,911.00	\$1,922.00	-\$11.00	\$93.00	\$104.00

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
0	\$0.00	Jun 28, 2018	Jun 28, 2018	6/12/2018 10:45AM	00836	Dane Rasmuson	Refund	0		-\$10.00	
0	\$0.00	Jun 27, 2018	Jun 27, 2018	6/27/2017 10:00AM	0299T	Dane Rasmuson	Debit	Credit		\$2,000.00	
2	\$0.00	Jun 27, 2018	Jun 27, 2018	6/27/2017 10:00AM		Dane Rasmuson	Refund			-\$70.00	
0	\$10.00	Jun 27, 2018	Jun 27, 2018	6/26/2017 10:45AM		Dane Rasmuson		Credit	0	\$10.00	
0	-\$100.00	Mar 28, 2018	Mar 28, 2018			Dane Rasmuson	Patient Payments	Other	0	-\$100.00	
1	\$5.00	Mar 21, 2018	Mar 21, 2018			Dane Rasmuson		Credit	0	\$5.00	
1	\$5.00	Mar 21, 2018	Mar 21, 2018			Dane Rasmuson	Credit Card	Credit	0	\$5.00	

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.