

# 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' interface. On the left is a navigation menu with options like 'Billing Summary', 'Live Claims Feed', and 'Patient Payments (beta)'. The main area shows a summary table for 'Jenny Harris' with columns for 'Total Paid', 'Allocated Payment', 'Unallocated Payment', 'Statement Balance', and 'Total Balance'. Below this is a detailed table of transactions 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 summary table.

	Total Paid	Allocated Payment	Unallocated Payment	Statement Balance	Total Balance	
Jenny Harris	\$1,911.00	\$1,922.00	-\$11.00	\$93.00	\$104.00	<a href="#">Auto Fill</a>

  

#	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		-\$10.00		<a href="#">Receipt</a>
0	\$0.00	Jun 27, 2018	Jun 27, 2018	6/27/2017 10:00AM	0299T	Dane Rasmuson	Debit	Credit		\$2,000.00		<a href="#">Receipt</a>
2	\$0.00	Jun 27, 2018	Jun 27, 2018	6/27/2017 10:00AM		Dane Rasmuson		Refund		-\$70.00		<a href="#">Receipt</a>
0	\$10.00	Jun 27, 2018	Jun 27, 2018	6/26/2017 10:45AM		Dane Rasmuson		Credit		\$10.00		<a href="#">Receipt</a>
0	-\$100.00	Mar 28, 2018	Mar 28, 2018			Dane Rasmuson	Patient Payments	Other		-\$100.00		<a href="#">Receipt</a>
1	\$5.00	Mar 21, 2018	Mar 21, 2018			Dane Rasmuson		Credit		\$5.00		<a href="#">Receipt</a>
1	\$5.00	Mar 21, 2018	Mar 21, 2018			Dane Rasmuson	Credit Card	Credit		\$5.00		<a href="#">Receipt</a>

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 be allocated to appointments only if the provider has the auto-allocate feature enabled and is associated with the appointment.

## Auto-Allocation Logic:

- When a payment is posted for a specific appointment:
  - The system automatically applies the payment to that visit.
  - If there are line items with outstanding balances, the payment is applied to them.
  - If no line item has a balance, the payment is applied to the **first line item** by default.

## Auto-Apply Checkbox Behavior:

- The auto-apply settings (checkboxes) are applicable only when the unallocated payment is not tied to a

specific appointment, and a balance is created for the visit; it will auto-apply.

- Payments tied to a specific appointment will always be auto-applied within that visit based on line item balance logic.
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