Auto Fill Patient Payments

Last modified on 06/09/2025 12:01 pm EDT

> ℹ **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.

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.