

Auto Fill Patient Payments

Last modified on 09/18/2024 2:32 pm EDT

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.

The screenshot shows the 'Patient Payments' interface. On the left is a navigation 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 the tabs are search filters for 'From', 'To', 'Filter by Range', and 'Provider'. There are also 'Simple' and 'Condensed' view toggles and an 'Update' button. A summary table shows data for 'Jenny Harris' with columns for 'Total Paid', 'Allocated Payment', 'Unallocated Payment', 'Statement Balance', and 'Total Balance'. An 'Auto Fill' button is located to the right of the 'Total Balance' cell. Below this is a 'Print/Export' dropdown and an '+ Add' button. The bottom section is a detailed table with columns: '#', 'Unallocated', 'Posted Date', 'Payment Date', 'Appointment', 'Line Item', 'Provider', 'Payment Method', 'Type', 'Notes', 'Amount', and 'Total'. Each row includes a 'Receipt' button. A red arrow points from the 'Auto Fill' button in the summary table to the 'Receipt' button in the detailed 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	Auto Fill

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

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.