

How to Run an Unallocated Payment Report

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In DrChrono, patients can have an unallocated payment amount on their account. These would be payments posted to their account but are not attached to a specific appointment. These payments would be prepayments for service and could be utilized for any appointment; past, present, or future.

Here is how you can run a report to see all patients with unallocated payments.

1. Navigate to **Billing > Patient Payments**
2. Select the **Balance** tab

The screenshot shows the 'Patient Payments' interface with the 'Balance' tab selected. It features three filter options: 'Show zero unallocated payment', 'Show zero appointment balance', and 'Show zero patient responsibility', each with an unchecked checkbox. To the right of these are three date range selectors: 'Unallocated payment between from and to', 'Appointment balance between from and to', and 'Patient responsibility between from and to'. At the bottom left, there is a 'Provider: All' dropdown and a green button labeled 'Find misbalanced line items (internal)'. At the bottom right, there is a blue 'Update' button with a refresh icon.

3. Enter the dollar range that you would like to see. If you would like to see all unallocated payments, you can enter 1 in the **from** box and leave the **to** box empty. Once you have selected your dollar range, click on **Update**.

This screenshot is identical to the previous one, but a red rectangular box highlights the 'Unallocated payment between from and to' filter. The 'from' input field contains the number '1', and the 'to' input field is empty.

4. If you would like to export the report, click the **Export to File** button.

When the report has been generated, it will appear in the message center (envelope icon at the top right of the page).

5. Click **Generated Sheet: Patient Payments** under Incoming Messages. There you will have the option to save

to the patient's chart or

download the document.
