

# How to Run an Unallocated Payment Report

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In DrChrono, patients can have an unallocated payment amount on their account. These are payments posted to their account but 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 each checkbox is a label and a range selector: '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, press **Update**.

This screenshot is identical to the previous one, but a red arrow points to the 'Unallocated payment between' range selector, highlighting the 'from' and 'to' input boxes.

4. If you would like to export the report, press 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. Press **Generated Sheet: Patient Payments** under Incoming Messages. There you will have the option to save to the patient's chart or download the document.