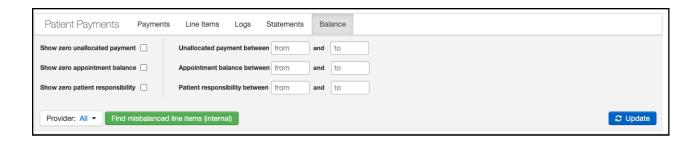
## How to Run an Unallocated Payment Report

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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



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**.



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

download the document.