

# Correcting a payment in the Patient Payments system

07/24/2024 1:25 pm EDT

If you encounter a payment that has been posted incorrectly, there is a way to correct it without deleting the entire payment. Although it is possible to completely delete a payment, the best practice is to correct the payment instead so that the historical information will remain should there be a need to research the payment in the future.

To correct a payment, please follow the steps below:

- Navigate to Billing > Patient Payments. Once the patient is selected, click on the green **+ Add** button.

The screenshot shows the 'Patient Payments' interface with tabs for Payments, Line Items, Logs, Statements, and Balance. Below the tabs are filters for 'From', 'To', 'Filter by Range' (with dollar signs), and 'Provider: All'. There are also toggle buttons for 'Simple: On', 'Condensed: On', and 'Internal: Off', along with an 'Update' button. A summary table is displayed with the following data:

Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment	Statement Balance	Total Balance
\$150.00	\$0.00	\$150.00	\$750.00	\$600.00

Below the table is a 'Print/Export' dropdown and a green '+ Add' button, which is highlighted with a red arrow. Below this is a table of payments with the following data:

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
0	<input type="checkbox"/>	\$150.00	Mar 30, 2023	Mar 30, 2023		Doctor Doctor	Credit Card	Credit		\$150.00	

A legend at the bottom indicates: Legend: |  Unallocated |  Fully Allocated |

- Select the appointment and under the Type dropdown, select Correction. The amount will populate as a negative value. Once all fields are entered, click on the blue **Add** button. The entry will populate as a new line item with correction under the Type field.

The screenshot shows the 'New Cash' form with the following fields: Payment Date, Appointment, Line Item (-No Line Item-), Provider, Payment Method (- Select Type -), Type, Notes, and Amount. The 'Type' dropdown menu is open, showing options: Credit (checked), Refund, Correction (highlighted with a blue bar and a red arrow), Copay, Coinsurance, and Other. At the bottom are 'Cancel' and 'Add' buttons.

If you need to print a receipt for the patient or record-keeping purposes, we automatically include a note stating that the entry was a correction.

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Payment Details

Patient:

Amount Paid: \$-10.00

Payment Type: Debit  
Payment Date: June 28th, 2018  
Note: Correction



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If you would like to completely delete the payment, please follow the steps included in this guide ([Deleting a payment](#)).