

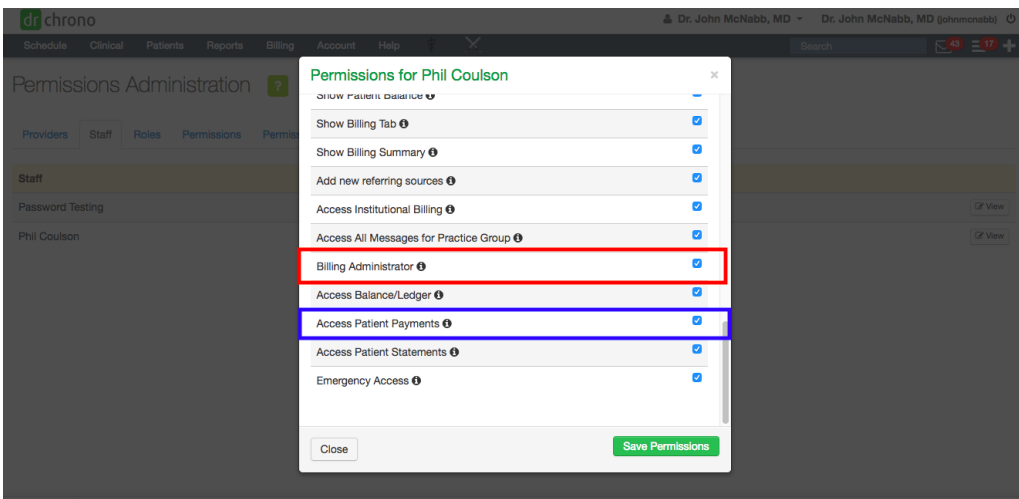
Deleting a payment in the Patient Payments system

07/24/2024 1:45 pm EDT

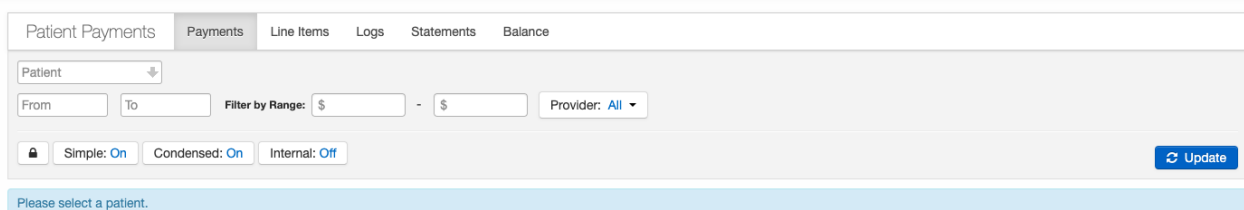
If there is an error in a payment posted, best practice is to counter-post a correction that will keep a record of the error and subsequent correction instead of deleting the payment, which will remove all records of it. ([How to enter a correction](#))

If you would like to delete the entries outright, you can delete payments that were entered in error. To do so, you'll need the **Billing Administrator** and **Access Patient Payments** permissions enabled for your login. Only those with Billing Administrator privileges will be able to completely delete payments.

If you are a practice admin, make sure you have these permissions checked off for any Staff Members who will need to delete payments in totality. ([How to set Staff Permissions](#))



With "Billing Administrator" and "Access Patient Payments" enabled, go to **Billing > Patient Payments**



Click on the **Payments** tab in the top left corner, then search for the patient you need and click **Update** on the right side of the screen.

Patient Payments | Payments | Line Items | Logs | Statements | Balance | Feedback

Patient: [Dropdown]
 From: [Date] To: [Date] Filter by Range: \$ [Amount] - \$ [Amount] Provider: All [Dropdown]
 Simple: On Condensed: On [Update]

Please select a patient.

1 - 10 OF 10

Patient Name	Chart ID	Appointment Balance	Total Payment	Unallocated Payment	Current Patient Responsibility
Aab AABBB Mr.	AAAA000001	\$263.00	\$50.00	\$50.00	\$213.00

You can then click the **Lock Icon** on the left side of the screen to enter **Unlock Mode**. You'll get a pop-up asking **Are you sure?** to which you can reply **OK**. This will "unlock" the screen, allowing you to delete the payment.

dr chrono | johnmcnabb.drchrono.com says | Are you sure? | Cancel | OK

Patient Payments | Payments | Line Items | Logs | Feedback

Steve Rogers [Dropdown]
 From: [Date] To: [Date] Filter by Range: \$ [Amount] - \$ [Amount] Provider: All [Dropdown]
 Simple: On Condensed: On [Update]

	Total Paid	Allocated Payment	Unallocated Payment	Statement Balance	Total Balance
Steve Rogers	\$9,625.00	\$793.50	\$8,831.50	\$45,848.06	\$38,435.19

Print/Export + Add

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total	
1	\$0.00	Apr 11, 2018	Apr 11, 2018	4/11/2018 02:00PM		Dr. John McNabb, MD	Cash	Credit		\$366.50		[Receipt]

Once in unlock mode, you can identify the payment which needs to be deleted, and click the **red X icon** to the right of that payment. The system will ask you to confirm the deletion, and after doing so, the payment will be deleted.

Confirm payment deletion, this will delete all moved cash as well! | Cancel | OK

Patient Payments | Payments | Line Items | Logs | Feedback

Jason (Demo) Buckley [Dropdown]
 From: [Date] To: [Date] Filter by Range: \$ [Amount] - \$ [Amount] Provider: All [Dropdown]
 Simple: On Condensed: On Internal: Off [Update]

UNLOCK MODE

	Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment	Statement Balance	Total Balance	
Jason (Demo) Buckley	\$1,102.00	\$0.28	\$1,101.72	\$6,679.42	\$5,577.70	[Auto Fill]

Print/Export + Add

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total	
1	\$19.72	Nov 14, 2019	Nov 14, 2019	11/14/2019 12:15PM		Dan Guidebeck	Cash	Credit		\$20.00		[Receipt] [X] [Close]
0	\$1,000.00	Jun 13, 2019	Jun 13, 2019	6/10/2019 03:45PM		Dan Guidebeck	Cash	Credit		\$1,000.00		[Receipt] [X] [Close] Delete this payment
0	\$82.00	Jun 10, 2019	Jun 10, 2019			Dan Guidebeck	Cash	Credit		\$82.00		[Receipt] [X] [Close]

Legend: [Red Circle] Unallocated | [Grey Circle] Fully Allocated |