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)

dr chrono		🐣 Dr. John McNabb, MD	 Dr. John McNabb, MI 	
Schedule Clinical Patients Reports Billing	Account Help 🕸 🔀			
Permissions Administration	Permissions for Phil Coulson	×		
Providers Staff Roles Permissions Permiss	Show Billing Tab 🚯			
	Show Billing Summary			
Staff	Add new referring sources 0	۲		
Password Testing	Access Institutional Billing 0	0		
Phil Coulson	Access All Messages for Practice Group 0	۲		
	Billing Administrator			
	Access Balance/Ledger			
	Access Patient Payments 0			
	Access Patient Statements ()			
	Emergency Access ()			
	Close	Permissions		

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

Patient Payments Payments	Line Items Logs Statements	Balance
Patient 🔸 From To Filter	by Range: \$ - \$	Provider: All •
Simple: On Condensed: On	Internal: Off	C Update
Please select a patient.		

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									
From	Filter by	y Range: \$		- \$	Pro	vider: All -			
Simple: On C	ondensed: On								C Update
Please select a patient.									
									1 - 10 OF 10
Patient Name	Cha	art ID		Appoint	ment Balance	Total Payment	Unallocated	d Payment	Current Patient Responsibilit
🖕 AAb AABBB Mr.	AAA	AA000001			\$263.00	\$50.00		\$50.00	\$213.0

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	lohn	McNabb, MD 👻	Dr. John McNabb, MD (johnmena
Schedule Clinical Patients Reports Billing Acc	Are you sure?		Sea	rch 🔤 🛃
Patient Payments Payments Line Items Logs		Cancel OK		🗩 Feedba
Steve Rogers				
From To Filter by Range: \$	- \$ Provider: All -			
Simple: On Condensed: On		I		C Upd
Tota	al Paid Allocated Payment	Unallocated Payment	Statement Bala	nce Total Balance
Steve Rogers \$9,6	\$25.00 \$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

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.

Billing	Account						TeachMe	Search			⊵ ³8 Ξ	18
Payment	S Payme			Can	Cel OK							
o) Buckley												
То	Fi	iter by Bange:	- \$		Provider							
		φ. φ	Ψ		i tovider.	7.01						
	Condensed: (n Internal:	Off								😂 Upo	
ipie: On	oonachibea.											da
ipie: On	Condensed.										e Opt	da
ODE	oondensed. e										e Opc	da
											i opc	da
	Total		ocated Payment (Paid to /	Appt) l	Jnallocated Paym	ent Staterr	ent Balance	Tot	al Balance)		da
		Paid All	ocated Payment (Paid to a \$0.28	Appt) I	Unallocated Payme \$1,101.72		ent Balance		al Balance 5,577.70	•	2 Opc	
ODE Buckley	Total I \$1,102	Paid All		Appt) l						3		
ODE	Total I \$1,102	Paid All		Appt) I						3		
ODE Buckley	Total I \$1,102 dd	Paid All	\$0.28	Appt) (i,679.42			3		
ODE Buckley	Total I \$1,102 dd	Paid All	\$0.28		\$1,101.72	\$¢	i,679.42	\$	5,577.70 Total		2 Auto	o F
ODE Buckley + A Unallocate	dd Posted Date	Paid All 2.00 Payment Date	\$0.28		\$1,101.72 Provider	\$6 Payment Method	5,679.42	\$ otes Amount	5,577.70		2 Auto	o F
	ayment	ayments Paym	ayments Payments Pa	ayments Payments Payments Payments Filter by Range: \$ - \$	Can ayments Paym b) Buckley To Filter by Range: \$ - \$	Cancel OK ayments Payments b) Buckley To Filter by Range: \$ - \$ Provider:	ayments Paym	ayments Paym	Cancel OK ayments Paym	ayments Paym	ayments Paym	ayments Paym