How Do I Unallocate a Payment if it is Posted to a Wrong Appointment?

07/24/2024 3:20 pm EDT

If you allocate money to the wrong appointment or line item, you have the ability to unallocate/delete those funds so they can be posted to the correct patient's appointment.

To do so, you'll need "Billing Administrator" and "Access Patient Payments" permissions allowed for your username. If you are a practice admin, make sure you have these permissions checked off for any Staff Members who will need to delete payments. (How to set Staff Permissions)

dr chrono		🚢 Dr. John McNabb, MD 👻 Dr. John McN	labb, MD (johnmenabb) の
Schedule Clinical Patients Reports Billing	Account Help 😤 🔀	Search	
Permissions Administration	Permissions for	_ ×	
Providers Staff Boles Permissions Permiss	Show Billing Tab	0	
	Show Billing Summary 19	0	
Staff	Add new referring sources ()	0	
Password Testing	Access Institutional Billing ()	0	
Phil Coulson	Access All Messages for Practice Group 1	0	
	Billing Administrator		
	Access Balance/Ledger 0		
	Access Patient Payments 0		
	Access Patient Statements 0	0	
	Emergency Access 0	0	
	Close	Save Permissions	

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

Billing

BILLING

Billing Summary Live Claims Feed

Patient Payments
Day Sheet
Transactions
Remittance Reports
Unmatched ERAs
Insurance Credit Card Payments
Accounts Receivable
Patient Statements
Product/Procedure
Patient Balance Ledger
Fee Schedule
Underpaid Items
Adjustment Master
Sales Tax
Billing Log

• Click on the **Payments** tab in the top left corner, then search for the patient you need and **Update**.

Patient Payments	Payments Line Items	Logs Statements Balance			Feedback
Patient	Filter by Bange: \$	- \$ Prr	vider: All 🔻		
Simple: On Co	ndensed: On				C 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**.
- Once in unlock mode, you can identify the payment which needs to be unallocated/deleted and click the red circle icon to the right of that payment. The system will ask you to confirm the deallocation, and after doing so, the payment will be deleted.

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