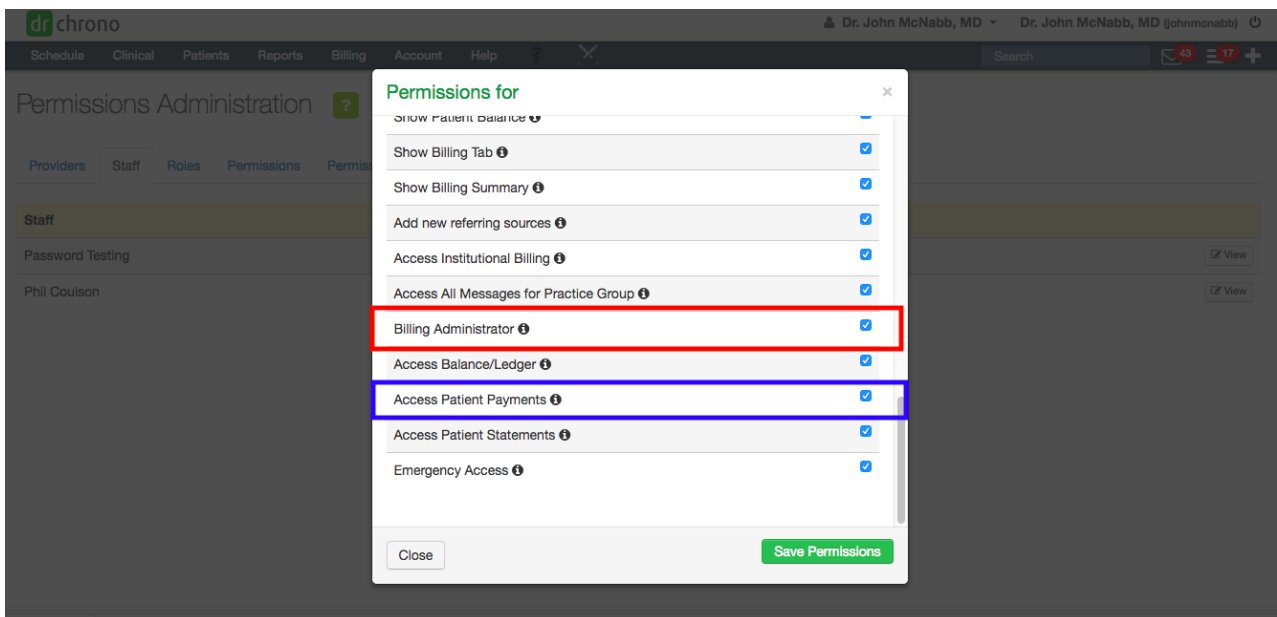


How Do I Unallocate a Payment if it is Posted to a Wrong Appointment?

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](#))



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

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: [Dropdown] | From: [Date] | To: [Date] | Filter by Range: \$ [Amount] - \$ [Amount] | Provider: All

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**.
- 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.

Confirm deallocation of line items, this will delete all line item allocations for this payment!

Cancel OK

Patient Payments

From: To: Filter by Range: \$ - \$ Provider: All

Simple: On Condensed: On Internal: Off

Update

UNLOCK MODE

Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment	Statement Balance	Total Balance
\$1,102.00	\$0.28	\$1,101.72	\$6,679.42	\$5,577.70

Print/Export + Add

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
1	<input type="checkbox"/>	\$19.72	Nov 14, 2019	Nov 14, 2019	11/14/2019 12:15PM		Cash	Credit		\$20.00	
0	<input type="checkbox"/>	\$1,000.00	Jun 13, 2019	Jun 13, 2019	6/10/2019 03:45PM			Credit		\$1,000.00	
0	<input type="checkbox"/>	\$82.00	Jun 10, 2019	Jun 10, 2019			Cash	Credit		\$82.00	

Legend: | Unallocated | Fully Allocated |

Unallocate all line items for this payment