

Correcting a payment in the Patient Payments system

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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:

1. Navigate to Billing > Patient Payments. Once the patient is selected, press the green **+ Add** button.

The screenshot shows the 'Patient Payments' interface. At the top, there are tabs for 'Payments', 'Line Items', 'Logs', 'Statements', and 'Balance'. Below the tabs, there are search filters for 'From', 'To', 'Filter by Range' (with dollar signs), and 'Provider: All'. There are also checkboxes for 'Simple: On', 'Condensed: On', and 'Internal: Off', along with an 'Update' button. A summary table shows: Total Paid (\$150.00), Allocated Payment (Paid to Appt) (\$0.00), Unallocated Payment (\$150.00), Statement Balance (\$750.00), and Total Balance (\$600.00). Below this is a 'Print/Export' dropdown and a green '+ Add' button with a red arrow pointing to it. A table of payments is shown with columns: #, Unallocated, Posted Date, Payment Date, Appointment, Line Item, Provider, Payment Method, Type, Notes, Amount, Total. The first row shows an unallocated payment of \$150.00 on Mar 30, 2023, for a Doctor Doctor via Credit Card. A legend at the bottom indicates 'Unallocated' (red circle) and 'Fully Allocated' (grey circle).

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

The screenshot shows the 'New Cash' form. It has fields for 'Payment Date', 'Appointment', 'Line Item' (set to '-No Line Item-'), 'Provider', 'Payment Method' (set to '- 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, there are 'Cancel' and 'Add' buttons.

4. If you need to print a receipt for the patient or for 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
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Payment Type: Debit
Payment Date: June 28th, 2018
Note: Correction 