

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, click on 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 are search filters for 'From', 'To', 'Filter by Range' (with dollar signs), and 'Provider: All'. There are also toggle switches for 'Simple: On', 'Condensed: On', and 'Internal: Off', along with an 'Update' button. A summary table is displayed with the following data:

Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment	Statement Balance	Total Balance
\$150.00	\$0.00	\$150.00	\$750.00	\$600.00

Below the summary table, there is a 'Print/Export' dropdown and a green '+ Add' button, which is highlighted with a red arrow. Below this is a table of payments:

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
1	<input type="checkbox"/>	Mar 30, 2023	Mar 30, 2023			Doctor Doctor	Credit Card	Credit		\$150.00	

At the bottom, there is a legend: 'Legend: | Unallocated | Fully Allocated |'. There is also a 'Receipt' button next to the payment entry.

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 correction under the Type field.

New Cash ×

Payment Date

Appointment

Line Item

Provider

Payment Method

Type Credit
 Refund
 Correction
 Copay
 Coinsurance
 Other

Notes

Amount

If you need to print a receipt for the patient or 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

Payment Type: Debit
Payment Date: June 28th, 2018
Note: Correction